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Advertising Age®

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Burger King threat puts heat on JWT

An Advertising Age roundup

Burger King Corp. is expected to tell J. Walter Thompson USA this week that its $200 million-plus account is "on notice" and likely up for review.

The possible loss of one of the agency's key accounts, coupled with ongoing internal turmoil, could put further pressure on JWT's stock price, industry analysts report.

The agency is not yet "in play," or a takeover target, partly because unfriendly takeovers are unusual in the agency business.

Adding to the agency's problems is concern over the $260 million Ford Motor Co. account, the agency's largest.

D. JOHNSTON

Sources close to Miami-based BK said the fast-food giant has not solicited presentations from other agencies but likely will do so in the "very near future."

Sources gave conflicting reports on whether a review is inevitable or if JWT will be given one more chance to save the fast-food chain's business.

Burger King, one of JWT's largest accounts, spent $167 million last year in measured media, according to Leading National Advertisers. BK puts its total ad spending at about $200 million.

A BK spokeswoman said the marketer has made "no final decision yet" on JWT or on the concept of developing a network of regional agencies.

She said BK has been evaluating its marketing program and its relationship with JWT as well as with "other vendors," and hopes to make a decision on all the matters by the end of this week.

BK's fiscal year ends May 31, she noted, adding that an agency review is not inevitable.

Asked whether JWT could save the account, she said, "Yes, it's possible."

The reports of a BK review hit Madison Avenue just days after Pillsbury Corp. officially announced a long-rumored organizational change that moves J. Jeffrey Campbell, the 42-year-old BK chairman-ceo, from Miami to headquarters in Minneapolis.

Mr. Campbell was named chairman of a newly formed and expanded Pillsbury Restaurant Group. In the new post, he oversees all Pillsbury restaurants, including Burger King, S&A group, Quick Wok and others. His Miami post remains unfilled.

JWT's latest BK campaign is themed "Best

(Continued on Page 106)

Mojo MDA's Alan "Mo" Morris (l.) and Allan "Jo" Johnston: Their "go for the heart" advertising philosophy wins Advertising Age's International Agency of the Year award for 1986.

Mojo MDA wins top AA honors

By GEOFFREY LEE MARTIN

Sydney—Young people swarm out of a high school here at the same time that a white Mojo MDA delivery van, boldly marked with the ad agency's blood-red logo, stops at a traffic light in front of the building.

Within seconds, the van is surrounded by youngsters chanting, "Come on, Aussie, come on, come on," an advertising jingle written by the agency to promote a cricket series and now virtually accepted as Australia's unofficial sporting anthem.

Some of the older boys change to "How 'ya feel" (from Tooheys beer commercials), and the kids start laughing.

"Hey, do you know Paul Hogan?" the van's driver is asked. He says he's met him, and the kids cheer.

Ad agencies that are as well-known to the public as the products they promote must be few and far between. Yet inci-

(Continued on Page 58)

Dentsu regains top ranking: Foreign Agency Income Report, Page 60.

Buick sets major shift in ad plans

By RAYMOND SERAFIN

Flint Mich.—Buick is restructuring its marketing and advertising departments, and will change ad direction this fall to reverse an alarming sales slump.

The new ad campaign coincides with—and could affect the perception of—the scheduled Oct. 1 launch of the new Buick Regal coupe, the first car to come out of parent General Motors Corp.'s so-called GM-10 program.

That $5 billion GM-10 program is important because it represents the No. 1 automaker's attempt to return to dominance in the lucrative midsize market.

McCann-Erickson, which has handled Buick since 1958, is believed to be secure for the 1988 model year, but could be in jeopardy

(Continued on Page 106)

Last Minute News

JWT juggles execs

New York—J. Walter Thompson Co. reconstructed its Office of the Chief Executive after the dismissal in the last few weeks of half its members. John Cronin remains vice chairman and a member of the Office but adds the title of chief advertising officer. Michael Cooper-Evans, president of JWT/Europe, is no longer a member of the Office but becomes one of eight executives on a new Management Committee. The two new members of the Office of the Chief Executive are Terence Martin, exec VP-chief financial officer, and Stephen Salorio, exec VP-general counsel. Don Johnston, JWT Group chairman-ceo, remains an Office member.

Luvs gets $20M effort

Cincinnati—Procter & Gamble next month breaks an estimated $15 million-to-$20 million introductory campaign for Luvs Deluxe superabsorbent disposable diapers, which replace Luvs

(Continued on Page 8)

P&G helps develop 'promotion' scanner

By JUDANN DAGNOLI

Chicago—Procter & Gamble Co. is aiding in the development of a new supermarket system that includes an interactive video screen and automatic dispensing of cents-off coupons and other customer rewards at checkout.

The Video Square system was unveiled at the Food Marketing Institute's annual convention here last week. It is a joint venture of Deerfield Beach, Fla.-based CheckRobot Inc. and Stamford, Conn.-based Donnelley Marketing, and was designed in conjunction with the CheckRobot supermarket scanning system.

Video Square is an optional promotional device that can be used with CheckRobot and some other supermarket scanning systems.

The machine itself involves an interactive video screen over a scanning belt, which allows consumers to scan the Universal Product Code bar codes on grocery packaging.

A video image of a woman speaks to them and guides them in the scanning.

CheckRobot's special promotional device, developed "in cooperation with" Cincinnati-based P&G, provides a variety of in-store promotional opportunities. A participating marketer can offer consumers coupons or price incentives, at checkout, for its brands rather than a competitor's.

In a demonstration at the convention, a person self-scanned a jar of Hunt-Wesson Foods' Peter Pan peanut butter. The video display rang up the purchase price, thanked the "customer" for the order, but reminded her that "Choosy mothers choose Jif" (P&G's brand).

It then ran a 10 or 15-second clip from a Jif commercial and dispensed a 30¢-off coupon for Jif to be used on the next purchase.

Video Square also has the capability of offering "rewards" for buying selected brand-name items, such as a coupon for a free cake

(Continued on Page 104)

Highlights

Tall order at Nissan 4

The agency that wins the Nissan Motor Corp. USA account will take home much more than the company's $150 million-plus in billings. It will take on a business under severe pressure to reverse a slipping market share. Simply put: Nissan, which will be reviewing ad agencies to take over for a fired William Esty Co., is losing its grip on the U.S. market.

Business books rebound 6

Business publishers are starting to see an upturn in ad pages in 1987 after suffering through several years of no growth or losses in volume. Following what for many was a dismal 1986, some business magazines have rebounded, though none posted huge business gains.

Sears spans out 30

Sears, Roebuck & Co. intends to strengthen its position as the nation's leading retailer through an aggressive diversification program implemented by Chairman-CEO Edward Brennan. That diversification effort includes the continued expansion of the Discover credit/financial services card and an $8 million-to-$10 million ad campaign backing the July introduction of new McKids children's apparel.

Western agency outlook dim 32

Western agency executives aren't optimistic that their billings will grow much the remainder of the year. Executives attending the 37th annual Western States Advertising Agencies Association meeting April 30 through May 3 predicted any growth will be single-digit, with most gains coming from existing clients.

Endorsement pitch 34

Dwight Gooden's endorsement career remains in limbo following the baseball star's release April 29 from a drug rehabilitation clinic. Nike Inc., which has a lucrative contract with the New York Mets' pitcher that expires May 31, says it has had a "standing offer" for several months to renew the relationship. However, the new pact is said to include expanded morality and reimbursement clauses.

'Daily News' woes 38

As if the *Daily News* didn't have enough problems, its star columnist, Jimmy Breslin, has decided to jump ship at one of the most critical times in the paper's history. The *Daily News* is in serious financial trouble.

Early Babbitt 39

Bruce Babbitt, though never renowned as a gambler while governor of Arizona, is taking an early and big chance in his bid for the 1988 Democratic presidential nomination. Mr. Babbitt's first TV campaign, which broke last month in Cedar Rapids, Iowa, is believed to be the earliest in presidential campaign history.

McKinney's reflections 44

When it comes to building a solid, enduring relationship with clients, nothing can replace truth, honesty and integrity, says Monty McKinney, chairman of DDB Needham/West.

INTERNATIONAL

Dentsu tops agency incomes 60

This week Advertising Age presents the 25th annual Foreign Agency Income survey, covering 970 agencies in 72 countries. After a 2-year hold on the No. 1 spot as the world's largest advertising agency, Young & Rubicam was overtaken by Dentsu Inc., which reported gross income of $681.0 million on billings of $5.31 billion for 1986.

OTHER NEWS

U.S. advertising expenditures rose 7.8% in 1986 to $102.14 billion, according to final industry tabulations. The pace of total ad growth appeared relatively good on the surface, but many of the largest major media sectors experienced a second year of disappointing results as their ad revenues failed to keep pace with the economy. Page 12.

As the guard changes in the chief executive suite at DYR Worldwide, with Young & Rubicam Exec VP Tim Pollak replacing DYR founder Alexander Brody as CEO, the agency appears at a crossroads. What is unclear is the commitment of the agency's parents, Y&R and Dentsu, to their unique, 50-50 joint venture—now 5 years old. Page 32.

Pepsi-Cola USA bottlers are teaming up with Chuck Yeager and Samsung Electronics America in a national sweepstakes centered around Paramount Pictures' "Top Gun" videocassette. Page 44.

When Bozell, Jacobs, Kenyon & Eckhardt decided against pursuing a $1 million public relations assignment for conservative fund-raiser Carl Channell in 1986, VP Jim McAvoy had little reason to suspect the assignment was part of Lt. Col. Oliver North's surreptitious plan to arm Nicaraguan Contras. Page 48.

A national study, sponsored by Advertising Age, will be conducted this year to find out how consumers feel about product packaging, trademarks and corporate logos. Page 56.

SPECIAL REPORT

RESEARCH BUSINESS REVIEW
THE NATION'S TOP MARKETING ADVERTISING RESEARCH COMPANIES

***Research Business Review**—The 13th annual review of the industry's performance profiles the top 46 research companies and analyzes why the companies' total worldwide revenue growth, which had a "real" increase of 14.3% in 1986 over 1985, is largely illusory.*

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P&G's Vicks consolidates global shops

By DENNIS CHASE

NEWS ANALYSIS

Procter & Gamble Co. is "Procterizing" its Richardson-Vicks acquisition of two years ago by changing R-V's culture, organization and approach to marketing outside the U.S.

P&G last week consolidated an estimated $75 million-to-$100 million in R-V advertising overseas with agencies long favored by P&G.

The move causes R-V's global agency roster to more closely resemble P&G's.

The biggest winner was D'Arcy Masius Benton & Bowles, which took over an estimated $35 million in new business and replaces Saatchi & Saatchi Compton Worldwide as the No. 1 P&G agency.

Also among the winners: Leo Burnett Co., which picked up an estimated $20 million; S&SC, with an estimated $15 million; and Grey Advertising, with an estimated $10 million. All of these are P&G's top domestic agencies.

Wells, Rich, Greene, which ranks No. 4 domestically, has a

(Continued on Page 108)

New York's concern about AIDS prompted Saatchi & Saatchi Compton to develop this TV spot featuring a woman who leaves a hot embrace after her lover refuses to use a condom.

New York City tries AIDS ads

By PATRICIA WINTERS

New York is unveiling a controversial AIDS-prevention campaign today that already has been rejected by an ABC-owned TV station.

The series of three TV spots, four radio commercials and five print ads are themed "AIDS: If you think you can't get it, you're dead wrong." The ads carry an 800 information number and target 20-to-35-year-olds.

One spot shows a woman getting dressed for the evening, while James Taylor's song "Don't Let Me Be Lonesome Tonight" plays in the background. In addition to putting on her earrings and brushing her hair, she takes a condom from her drawer and puts it in her purse.

WABC-TV refused to air the spots because they show condoms, according to Saatchi & Saatchi Compton Worldwide, New York, which created the campaign gratis for the city's Department of Health. The station, which does not accept condom ads, could not be

(Continued on Page 106)

Fed to Pearlman

City Of Commerce, Calif.—The Federated Group hired Pearlman/Wohl/Olshever/Marchese, Los Angeles, to handle its estimated $25 million account after a monthlong review.

Shadoevision, the agency/production house owned by longtime Federated spokesman Shadoe "Fred Rated" Stevens, previously handled creative for the consumer-electronics retailer.

Mr. Stevens will continue as spokesman.

West Coast News

Geoff Meredith, 44, has been named senior VP-general manager, DJMC, San Francisco, a new post, from senior VP-director of new business. Mr. Meredith joined DJMC in December after three years as senior VP-director of strategic planning and new-business development at Hal Riney & Partners.#

Nissan faces tough road

Agency must aid skidding client

By CLEVELAND HORTON

The agency that wins the Nissan Motor Corp. USA account will take home more than the company's $150 million-plus in billings. It will take on a business under severe pressure to reverse a slipping market share.

Simply put: Nissan, which will be reviewing ad agencies to take over for a fired William Esty Co. (AA, May 4), could be losing its grip on the U.S. market.

Following a record sales year in 1985, Nissan, the No. 2 Japanese automaker in the U.S., watched its share of the U.S. car market drop to 4.8% last year from 5.2% the previous year. Over the same period, Japanese import leader Toyota Motor Sales held its 5.6% share while American Honda Motor Co. surged ahead, boosting its share to 6.1%, up from 5.0% in 1985.

Nissan's truck sales proved even more disappointing last year, especially after the introduction of the U.S.-designed Hardbody pickup in January 1986.

Unlike Japanese cars, imported trucks aren't restricted by Japanese government quotas. Nevertheless, Nissan's share of the light-duty truck market dropped to 4.9% last year, from 5.8% in 1985.

Other Japanese truck marketers didn't experience similar declines. Toyota added one full share point—to 8.4%—during that same period. Likewise, Mazda Motors of America increased its share to 3.4%, up from 2.6% in 1985. The total truck market gained 4.6%, to 4.6 million vehicles.

Perhaps more telling is Nissan's performance in California, a bellwether state and long a bastion of the imports.

Nissan's share of the Golden State car market fell 1.7%, to 7.8%, in 1986. During the same period, Toyota held almost steady at 9.4%, while Honda (excluding sales of its upscale Acura division) gained almost a full share point, to 9.5%.

> *"We're going in with wide parameters. We have no predetermined ideas about the size of our next agency."*
>
> **—Nissan Senior VP-Marketing and Sales C.P. "Chuck" King**

An influx of new-car models enabled Nissan to brake its sales decline during the first four months of 1987. Sales of U.S.-built and imported Nissan car models combined were up 13.2%, compared to the same period in '86. Truck sales were up 6.2%, compared to the same period in 1986, when the new Hardbody pickup struggled in its launch.

Some of the pressure on Nissan's U.S. marketing arm to perform better comes from Japanese parent Nissan Motor Co., whose share of its home market has declined from 30% to 24% over a six-year period. The company posted its first non-consolidated operating loss in 37 years in the first half of its operating year (ending September 1986).

Nissan plans—optimistically—to name a new agency by early July. The Carson, Calif.-based company then will ask its new agency to produce advertising using a whole new approach to marketing Nissan.

This "blockbuster" effort must be developed in time for the 1988 model year, which starts in October.

Nissan believes the deadline is feasible. Senior VP-Marketing and Sales C.P. "Chuck" King said Esty faced similar time demands when the agency originally snared what was then known as the Datsun account in 1977. (At the time, it was a $35 million piece of business handled, until then, by the now-defunct Parker Advertising, Los Angeles.)

"It was the same thing with Esty," Mr. King said, "They developed the 'We are driven' theme for [original] presentation. I expect to see the same thing happening this time."

The 2-year-old "The name is Nissan" message has run its cycle; all but 70 of its 1,100 dealers have replaced their Datsun signs with the new name, a long name-change process instituted to bring the U.S. nameplate into line with what the company and its cars were known as around the world.

Nissan is completing extensive market research to guide the new agency in boosting awareness of the company. The research will be shared among all the finalists in the review. Nissan already has incorporated some of the preliminary results of that research into its current Esty-produced ads.

The company added to its corporate-identity "Name is Nissan" campaign the new slogan "We make you feel like driving" in several upbeat TV commercials that began airing earlier this year.

Likewise, it altered spending levels between car and truck lines to more closely mirror sales. Instead of devoting about 60% of its budget to trucks, Nissan is currently spending about 70% of its dollars to promote cars.

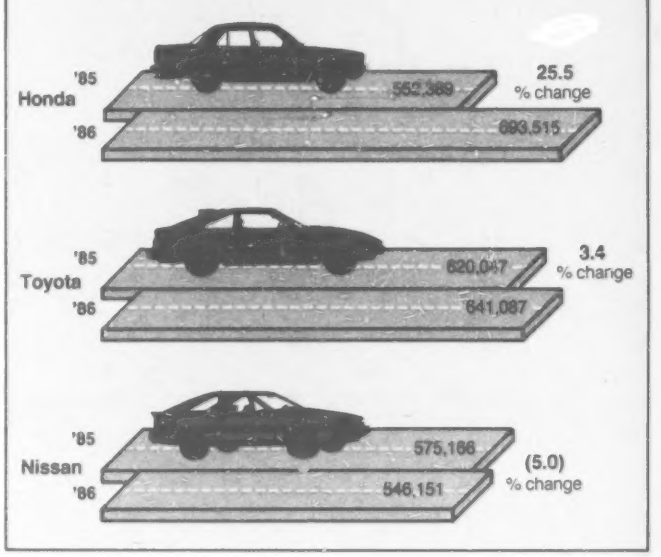
In addition, it is purchasing a larger percentage of network TV time, in a bid to increase its profile nationally.

Canter, Achenbaum Associates, New York, is organizing the

(Continued on Page 103)

How Japanese Big 3 have fared

A comparison of 1985 and 1986 U.S. sales of cars from the three biggest Japanese automakers shows a slippage last year by Nissan. Totals include both imported and domestically built cars. Source: *Automotive News*.



Graphic by Amy Palmer

U.S. NewsWatch

Marketing news from regional centers across the country

Genesee Brewing taps Levine, Huntley

ROCHESTER, N.Y.—Genesee Brewing Co. has named Levine, Huntley, Schmidt & Beaver, New York, to handle its $8 million-to-$10 million account after a three-month search. William Esty Co., New York, lost the account after 20 years. To take on Genesee, Levine, Huntley had to resign Greenwich, Conn.-based Kronenburg USA's account, now in review. Genesee markets ale, beer, cream ale, light beer and 12 Horse beer in New York, Ohio and Pennsylvania.

BALTIMORE—**Maryland State Lottery** is considering four local agencies for its $4 million-to-$5 million account: Eisner & Associates; Smith Burke & Azzam; incumbent Trahan, Burden & Charles; and VanSant Dugdale & Co. The lottery is expected to name an agency later this week.

MILWAUKEE—**Miller Brewing Co.** begins a three-month "Everyone's a winner" sweepstakes for its Meister Brau beer in Indiana, Hawaii, North Carolina, Oregon, Pennsylvania and South Carolina

(Continued on Page 82)

WHO PUT A CHERRY IN 7 UP?

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Special Report

RESEARCH BUSINESS REVIEW

THE NATION'S TOP MARKETING ADVERTISING RESEARCH COMPANIES

Jeffrey Toth

Top 46 companies' growth is partly illusion

By Jack J. Honomichl

The year 1986 had some good news and not-so-good news for the marketing/advertising/public opinion research industry, according to the 13th annual review of industry performance prepared exclusively for ADVERTISING AGE.

The good news first. According to the financial records of 46 leading U.S. research companies, their total worldwide revenues of $1,911,200,000 were up 16.2% over 1985, and after adjustment for inflation (1.9% according to the U.S. Department of Labor Consumer Price Index-U, monthly average), the "real growth" rate was 14.3%, the highest ever enjoyed since this compilation started in 1975.

Jack J. Honomichl writes a regular column on research in ADVERTISING AGE.

However, to a large degree, this extraordinary growth is illusory. For one thing, the Top 46 list is heavily weighted by four organizations that have a large percentage of their volume coming from outside the U.S.: A. C. Nielsen, IMS International, MRB Group and Louis Harris and Associates.

Total worldwide revenues of the top 46 U.S. research companies had a "real" growth of 14.3% in 1986 over 1985 . . . but this extraordinary growth is illusory.

Together, these account for nearly one-half of the list's $1.9 billion total. Because so much of their revenue came from outside the U.S., their gains over 1985 were very significantly inflated by the weakening of the U.S. dollar vis-a-vis most foreign currencies. Or, the flip side: Ironically, to a large degree, the 1986 industry growth was because of the weakening U.S. dollar.

Also, 1986 was an election year, and its impact shows vividly for the two top companies that are heavily involved in political polling, Decision/Making/Information and Market Opinion Research; both enjoyed extraordinary gains in 1986.

Another sobering concern comes from the supplementary data furnished by CASRO (Council of American Survey Research Organi-

(Continued on Page S-2)

The nation's top 46 research companies profiled

1 **A.C. Nielsen Co.,** Northbrook, Ill. Founded in 1923; since 1984 a wholly owned subsidiary of Dun & Bradstreet Corp. Research revenues in 1986 are estimated at $615 million, up about 19% from 1985.

There are two units: the Marketing Research Group, with estimated revenues of $500 million in 1986, up about 20.7% from 1985, with client service offices in 12 U.S. cities and subsidiaries in 27 countries, and the Media Research Group, with estimated revenues of $115 million in 1986, about 11.7% over 1985, with eight U.S. offices and operations in five countries.

In 1985, an estimated 52% of ACN revenues came from operations overseas; that is believed to have increased to about 60% in 1986 because of shifts in the relationship of the U.S. dollar vis-a-vis foreign currencies, which tended to inflate ACN's total revenue growth (as it did for other research organizations with large overseas operations). Because ACN parent Dun & Bradstreet does not release precise performance figures, it is impossible to calculate the exact impact this currency reevaluation has had.

During 1986, ACN's Marketing Research Group in the U.S. expanded its Scantrack service, based on universal product code data captured at the supermarket level, which provides weekly information on product movement both nationally and, if desired, individually for each of 26 major markets. Also in 1986, ACN introduced Scantrack for retailers, which produces an expanded trading area report for their use.

The single-source test marketing system, ERIM, recently received financial approval to add four additional markets in 1987 and early 1988, and a comparable system, TELERIM, is underway in West Germany.

In the U.K., ACN recently acquired two rival store movement measurement organizations: Penarvon Plc. (Gwent, Wales) and STATS MR. Together, these add about $7.25 million to ACN U.K. revenues. During 1986, ACN acquired a Finnish store audit company, Marketindex, thereby adding another country to the worldwide network. In the U.S., ACN acquired MAJERS Corp., Omaha, Neb., a company specializing in the evaluation of trade advertising and sales promotions (no MAJERS revenues are in the annual ACN revenues listed above).

John C. Holt
A.C. Nielsen Co.

Also, ACN is planning the addition of Scantrack-like market measurement systems in both Canada and the U.K.

During 1986, the Media Research Group in the U.S. continued its shift to peoplemeter technology and away from the long-established household diary method of data collection for the national Nielsen Television Index. Approximately 1,000

How they rank

1986 revenues
46 leading U.S. research organizations

Rank 1986	Rank 1985	Organization	Total research revenues* (millions)	% change vs. 1985**	% Revenues from outside U.S.
1	1	A. C. Nielsen Co.	$615.0	+19.0%	Approx. 60%
2	2	IMS International	245.4	+41.8	45.6
3	3	SAMI/Burke	174.5	+ 7.7	3.5
4	4	Arbitron Ratings Co.	137.2	+12.3	–
5	5	Information Resources	93.6	+21.2	4.0
6	–	MRB Group	52.0	+ 8.7	37.0
7	7	M/A/R/C	47.5	+ 2.6	–
8	9	NFO Research	36.7	+ 7.0	–
9	8	Market Facts	36.0	– 4.6	–
10	10	NPD Group	35.5	+ 7.3	1.4
11	12	Westat	35.2	+39.9	–
12	11	Maritz Marketing Research	32.9	+ 9.6	–
13	13	Elrick and Lavidge	26.7	+ 8.5	–
14	15	YSW/Clancy Shulman	22.0	+12.8	–
15	14	Walker Research	21.3	+ 2.6	–
16	16	Chilton Research	19.5	+ 2.1	–
17	19	ASI Market Research	17.1	+ 8.6	–
18	22	Decisions Center	15.6	+13.0	–
19	18	Louis Harris and Associates	15.5	– 2.0	43.0
20	20	Opinion Research Corp.	15.2	+ 4.8	–
21	23	Ehrhart-Babic Group	14.5	+ 5.1	–
22	27	National Analysts	13.3	+38.5	–
23	24	Harte-Hanks Marketing Services Group	12.2	+ 4.6	–
24	28	Mediamark Research	21.1	+26.6	–
25	25	Data Development Corp.	10.5	– 2.7	–
26	26	Custom Research	10.4	+ 7.2	–
27	36	Decision/Making/ Information	10.4	+55.2	–
28	35	Decision Research Corp.	9.8	+16.7	–
29	32	Gallup Organization	9.7	+13.1	–
30	37	Market Opinion Research	9.4	+45.0	–
31	29	Admar Research	9.4	+ 5.6	–
32	30	Starch INRA Hooper	9.1	+ 2.8	–
33	33	National Research Group	8.9	+ 9.9	11.0
34	31	McCollum/Spielman Research	8.4	– 2.3	–
35	38	Guideline Research	7.5	+15.4	–
36	34	Response Analysis	6.9	– 9.3	–
37	40	J.D. Power & Associates	6.1	+ 5.2	–
38	39	Ad Factors/Millward Brown	5.9	0	–
39	42	Marketing Research Services	5.8	+13.7	–
40	42	Oxtoby-Smith	5.8	+16.0	–
41	–	Birch Research	5.8	+25.4	–
42	–	Newman-Stein	5.3	+ 4.9	–
43	–	Field Research Corp.	5.2	+28.0	–
44	41	Lieberman Research West	5.2	–12.7	–
45	46	Kapuler Marketing Research	5.1	+ 6.0	–
46	–	Total Research Corp.	5.0	+48.4	–
		Sub total, top 46	$1,911.2***	+16.2%	Approx. 26.8%
		All other (90 CASRO companies not included in top 46)	207.5	+ 6.6	
		Total (136 organizations)	**$2,118.7**	+15.1%	

*Total revenues that include non-research activities, for some companies, are significantly higher. This information is given in the individual company profiles in the main article.

**Rate of growth from year to year has been adjusted so as not to include revenue gains from acquisition. See main article for explanation.

***Rounded to nearest hundred thousand.

****Total revenues of 90 survey research firms—over and beyond those listed in top 46 list—that provide financial information, on a confidential basis, to CASRO.

Illusion

(Continued from Page S-1)

zations). The $207.5 million in revenues reported by 90 CASRO member firms not included in the Top 46 listing represented a gain of 6.6% from 1985. So, the smaller firms did not share the boom of their big brothers in 1986.

Adding the CASRO figures gives us a base of 136 research companies with total revenues of $2,118,700,000 in 1986, or a 15.1% increase from 1985. After adjustment for inflation, this nets a "real growth" rate of 13.2%.

This year's list expanded to 46 companies despite the loss of three—Burke Marketing Services, Simmons Market Research Bureau and Winona Research—that had line identity last year but now are included via merger in new listings, namely SAMI/Burke and MRB Group, No. 6 on this year's list, which represents the merging of JWT Group research organizations around the world into one division under one manager. The other newcomers were Total Research Corp., Field Research Corp., Newman-Stein and Birch Research.

Of the list's $1,911,200,000 total, more than $1.6 billion—or 84%—comes from research organizations that either are public companies or subsidiaries of publicly listed companies. The corporate owners of the research industry today include Time Inc., Control Data Corp., JWT Group, Dun & Bradstreet, Saatchi & Saatchi, Capital Cities/ABC, Gannett Co., IDC Services and Arthur D. Little, to name a few.

Of the 10 largest companies, only one—the NPD Group—is still privately held.

Another sign of the times: Of the 46 organizations listed, four—NFO Research, YSW/Clancy Shulman, Birch Research and Ad Factors/Millward Brown—are owned wholly or in part by European companies. The second largest, IMS International, while a U.S. registered corporation, is run by a top management staff in London.

Eight of the Top 46 had revenues from outside the U.S., and this totals about $518 million, or 27% of the list's total. This is up from $369.8 million and about 22% in 1985.

Eight of the top executives in the 1985 listing are no longer there, mostly because of retirement *(see sidebar on Page S-8)*. And, as in previous years, the research industry growth exceeded that of America's largest advertising agencies *(see sidebar on Page S-14)*.

The company-by-company profiles that follow detail the operations of each of 1986's Top 46, major changes that took place during 1986 and companies' plans for the balance of 1987.

Top research companies

households had peoplemeters installed in 1986, and this is expected to increase to 2,000 households by September and to at least 4,000 by September, 1988.

Atlanta became the 13th local meter market panel in 1986. The U.S. group introduced Spotbuyer, a software system for TV prebuy estimations; Audience Analyst, a PC software package; and Cable Audience profiles. In Canada, ACN recently completed agreement for a national metered TV audience measurement system.

Chairman-CEO of A.C. Nielsen Company is John C. Holt, 48, who has a B.S. from Southern Illinois University. He is also an executive vp and board member of Dun & Bradstreet. Richard W. Vipond, 59, is president of the Marketing Research Group, and James D. Lyons, 52, is president of the Media Research Group.

2 **IMS**, New York. Founded in 1954; public company traded over the counter. Research-only revenues in 1986 were $245.4 million, up 41.8% from 1985.

IMS revenues in 1986 were $375.5 million, of which $266 million were attributable to its Market Research Division. Some MRD revenues from computer-based mailing and marketing activities have been subtracted; these amounted to $14.0 million in 1985 and $20.6 million in 1986. Further, IMS made several acquisitions in 1985 and 1986, namely Healthcare Information Programs, Luning Prak Associates, LP Audits, Fisher-Stevens and Clark-O'Neill.

While these new revenues are included in the $245.4 million shown above, adjustments have been made, inasmuch as is possible, so that they do not impact the 41.8% growth rate, which in turn was greatly influenced in 1986 by the weakening of the U.S. dollar vis-a-vis foreign currencies; 45.6% of IMS MRD revenues come from operations in 63 countries outside the U.S.

The U.S. subsidiary, IMS America, is headquartered in Ambler, Pa. There are about 3,600 IMS employees in the market research operation, approximately 1,700 of whom are in the U.S.

IMS has a battery of market research services and syndicated reports, most of them related to the worldwide pharmaceutical industry. Data series pertain, for instance, to ethical pharmaceuticals, over-the-counter pharmaceuticals, medical diagnoses and treatments, medical promotion efforts, hospital and laboratory suppliers, animal health products and personal care products. Most of these data are collected via audits and/or panels, and the resulting data bases are available on-line via Inbase, a text retrieval system. The company also does custom research.

Robert Louis-Dreyfus
IMS

Although IMS is a U.S.-registered corporation, all its top officers are located in London.

President-CEO is Robert Louis-Dreyfus, 40, who has an M.B.A. from Harvard University. Andrew L. Clark, 61, is chairman. Christian Tourres, a senior vp, heads the Market Research Division.

3 **SAMI/Burke**, Cincinnati. Founded in 1966, a wholly owned subsidiary of Time Inc. Revenues in 1986 are estimated at $174.5 million, up 7.7% from 1985.

This organization is the result of the merger of Selling Areas-Marketing Inc. (SAMI) and Burke Marketing Services Inc., which it acquired in 1986.

SAMI/Burke now is organized into three divisions: Data Base Services, SAMI, Samscan and DecisionMaster SM; Market Testing and Modeling Services, TMG AND BASES; and Custom Services, Burke Marketing Research.

Jack E. Brown
SAMI/Burke

The Data Bases Services Division provides product movement data through its SAMI and Samscan syndicated services. SAMI reports on the movement of more than 180,000 consumer products in more than 500 categories from warehouse withdrawal to supermarket, drug and mass merchandiser outlets. The food and drug service provides data on each of 54 SAMI-defined market areas. The mass merchandiser service will be provided nationally by the end of 1987.

Samscan provides product movement, volume, share of market, distribution and price data, based on a sample of UPC scanner-equipped supermarkets, with data reported on 20 markets separately (to be expanded to 54 SAMI market areas by the end of 1989).

Later this year, SAMI/Burke

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Top research companies

plans introduction of DecisionMaster SM, a system that will deliver electronically, via a standard PC in conjunction with a high-capacity optical disk storage device, access to the SAMI/Samscan data bases. Advanced analytical and decision support software packages and models also are available through DecisionMaster.

The Market Testing and Modeling Division includes Bases, the market leader in predictive modeling for new product testing and forecasting, Bases LX for line extensions and Restager for product restages and the Test Marketing Group, which offers a wide range of market testing services, including electronic test marketing in its AdTel markets. TMG recently introduced two new market models, Projector and Sourcerer, to enhance the learning experience from test marketing.

The Custom Services Division (Burke Marketing Research) provides survey field and tab and full-service survey services, including TV commercial testing (Selector) and print, billboard and package testing with eye movement technologies.

The Burke Institute markets an extensive curriculum of courses related to professional training.

Jack E. Brown, 43, formerly chairman of Burke Marketing Services, became president of SAMI/Burke in September, 1986. He attended the University of Cincinnati.

4 Arbitron Ratings Co., New York. Founded in 1949 and since 1967 a wholly owned subsidiary of Control Data Corp. Revenues in 1986 are estimated at $137.2 million, up 12.3% from 1985.

Arbitron produces radio, TV and cable audience studies at the local-market level using mail diaries or panels of meter—or peoplemeter—equipped households. Surveys in 214 TV markets (ADIs), 12 of which are measured by a combination of meters and diaries and one of which (Denver) is measured by a peoplemeter service, account for 51.5% of Arbitron revenues; the balance comes from measurement of 260 radio markets.

In 1986, Arbitron expanded radio audience measurements in 75 markets year-round by conducting four 12-week-long surveys each year; this is expected to be expanded to 79 markets by the end of 1987. Also, starting with the spring survey results of 1987, Arbitron redesigned its local market reports to contain data on listening locations and audience composition.

Arbitron reports are available to radio and TV stations, advertisers and ad agencies via printed reports, computer-based applications such as Arbitrends and Product Target AID, which deliver updated data from the company's mainframe in Laurel, Md., for custom tabulation and analysis and an on-line database called Arbitron Information on Demand (AID).

A.J. Aurichio
Arbitron Ratings Co.

Recently, Arbitron introduced a variety of new analytical services designed to help clients to better use research as a sales tool. For instance, Broadcast Negotiator is a pre-buy and post-buy software system that enables easy analysis of Arbitron data in relation to specific media buys.

During 1986, Arbitron sold its interest in Burke Marketing Services Inc. to Selling-Areas Marketing Inc. and through its parent, Control Data, acquired Broadcast Advertiser Reports, the television commercial monitoring service, and Radio-TV Reports (RTV), its wholly owned subsidiary. BAR revenues are not included in the Arbitron research revenues.

Arbitron continues to develop its ScanAmerica service, which electronically measures TV viewing of individuals via peoplemeters and tracks products purchased in panel households via an in-home portable scanner that "reads" UPC bars on package goods. This system, now operative in Denver, will be expanded nationally for the 1988-89 TV season.

Arbitron has 1,235 full-time employees in 23 U.S. locations. A telephone-interviewing facility in Laurel, Md., has 55 stations.

President of Arbitron is A.J. "Rick" Aurichio, 50. He has an M.B.A. degree from Fairleigh Dickinson University. He also is a VP of Control Data Corp.

5 Information Resources Inc. Chicago. Public company traded over the counter; founded in 1977. Revenues in 1986 were $93.6 million, up 21.2% from 1985.

This expansion-minded firm made several major moves in 1986:

1. The BehaviorScan test market system, used for advertising and promotion testing and new product test marketing, opened two new markets (Salem, Ore., and Cedar Rapids, Iowa) in 1986, bringing the total to 10. IRI, through a joint venture with GfK-Nuremberg, has established a similar BehaviorScan market in West Germany and recently announced plans to set up a similar system in the U.K. on its own.

2. IRI introduced a new service, InfoScan, a national scanning service that tracks consumer purchasing (from a base

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Top research industry management sees change

The past year has seen numerous changes in top management of America's leading research companies.

The following have retired from their positions:

Henry Burk, chairman, A. C. Nielsen Co.; **Carlyle C. Daniel,** chairman-CEO, SAMI/Burke; **Theodore F. Shaker,** chairman-CEO, Arbitron Ratings Co.; **Robert J. Lavidge,** president, Elrick and Lavidge; **Irwin Miller,** chairman-CEO, Opinion Research Corp.

Other changes:

Henry Brenner, founder and chairman, NPD Group, sold his interest to partner Tod Johnson.

Donald B. Chapman, founder, chairman and CEO, Ad Factors Marketing Research, sold his interest in the company, relocated to California.

Gilbert Barrish, director, Chilton Research Services, left to join Opinion Research Corp.

—Jack J. Honomichl

Top research companies

of 60,000 households) of all UPC-coded products sold in supermarkets. It also provides data on promotion activities affecting sales, through newspaper ads, in-store displays, coupon redemption, etc. IRI plans during 1987 to complete the expansion of the InfoScan system to 2,400 stores and 80,000 panel households. Also, IRI plans to install peoplemeters in scanner panel households to measure TV viewership and audience composition.

3. IRI acquired the Data Group, a custom survey research organization, Marketing Advancements, a company specializing in coupon distribution measurements, and ABA Groups, a provider of computerized systems for retailers and manufacturer sales forces for shelf management studies. (While revenues from these acquisitions are reflected in the IRI 1986 revenues above, the rate of growth has been adjusted so that it is not artificially inflated by acquisition-gained revenue.)

4. IRI introduced PromotionScan, a syndicated service for tracking the sales impact of promotions in all UPC-coded product categories.

5. The firm also introduced a PC Workstation based on proprietary IRI software with brand, sales promotion and retailer management applications.

Gian Fulgoni
Information Resources

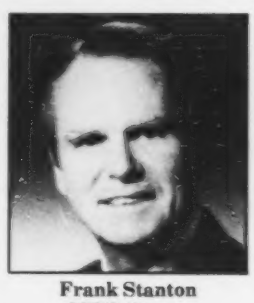
In addition, IRI markets the Marketing Fact Book service, an ongoing report on UPC-coded product movement collected at the household level, an expanded ASSESSOR simulated test market system to predict sales volume and market share of a new product at any point in the product development cycle, and a library of software for the maintenance and analysis of marketing information data bases.

There are 900 salaried, exempt employees in seven U.S. branch offices, and about 4% of revenues come from activities outside the U.S.

President-CEO of IRI is Gian Fulgoni, 39, who holds a master's degree from the University of Lancaster (England).

6 **MRB Group**, New York. Wholly owned subsidiary of JWT Group. Revenues in 1986 were $52 million, up 8.7% from 1985.

In 1986, JWT consolidated its research units into a single division. In the U.S., included are Simmons Market Research Bureau (founded in 1978) and Winona Research. The international group, headquartered in London, has 14 offices in Europe,



Frank Stanton
MRB Group

the Middle East, South Asia and Japan, and accounts for about 37% of total MRB revenues.

The SMRB annual "Study of Media & Markets," based on a sample of 19,000 adults covering exposure to all media, brand usage, leisure activities and financial services, is MRB's single largest product. In 1986, SMRB introduced Choices, a microcomputer system that makes the "Media & Markets" data base available on PCs.

In 1986, SMRB announced its plan to conduct the 56-market National Study of Local Newspaper Ratings, with field work starting last October. Approxi-

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Top research companies

mately 120,000 telephone interviews are being conducted with 65,000 adults. Results will be released this summer.

The Winona CATI facility in Phoenix, with 210 stations all equipped with four-color CRT screens, relocated in new quarters in 1986. Telephone interviewing accounts for about one-half of the Winona revenues, with the balance coming from product research mall studies and custom store audits through an office in Minneapolis. MRB Group has 642 full-time, salaried employees.

Chairman-CEO Frank Stanton, 57, has an M.A. from the University of Pennsylvania.

7 **M/A/R/C Inc.**, Irving, Texas. Founded in 1965; public corporation traded NASDAQ. Research revenues for the fiscal year ending March 31, 1987, were $47.5 million, up 2.6% from 1985. Revenues do not include $6.5 million from data base management for promotional purposes, a fast-growing segment of the total M/A/R/C operation.

M/A/R/C, primarily a survey research company, reduced its central telephone interviewing capacity to 260 stations during 1986; however, an additional 215 CRT-equipped stations for WATS interviewing are available through its Local Market Network (LMN), a system that electronically ties independent mall or central location facilities around the country to M/A/R/C's central computer system. The LMN on-line network provides two-way electronic communications with 30 markets and 52 sites. The National Neighborhood Panel Service is based on 72,000 households clustered around these sites.

During 1986, M/A/R/C continued expansion of its National Panel, about 300,000 households. Also during 1986, M/A/R/C relocated into a new six-story headquarters building near Dallas-Ft. Worth airport; underwent a management reorganization; closed less-efficient operations in Atlanta, New York and Chicago; entered the test marketing modeling business with a new product evaluation system, ENTRO; and entered into a joint venture with InterView NV, Amsterdam, to develop a PC version of M/A/R/C's automated interviewing and tabulation system. (The two companies collaborated on a public opinion telephone study

Sharon Munger
M/A/R/C

spanning the U.S. and several European countries, delivering 1,200 interviews within 62 hours after the questionnarie on the Iranian-Contra arms controversy was written.)

M/A/R/C has a full-time staff of 385 in 13 offices, plus an hourly staff of 184 and an hourly payroll of 1,080.

New president-chief operating officer of M/A/R/C, Sharon Munger, 40, has a B.A. from Vanderbilt University. Cecil B. (Bud) Phillips, 62, is chairman-CEO; he is graduate of Southern Methodist University.

8 **NFO Research**, Toledo, Ohio. Founded in 1946 and since 1982 a wholly owned subsidiary of AGB Research. Revenues in 1986 were $36.7 million, up 7% from 1985.

NFO operates a fixed mail panel of 350,000 households (including 900,000 individuals), catalogued by demographic and product ownership characteristics, which are used for either telephone or mail surveys. There are two central telephone interviewing facilities (Toledo and Greensboro, N.C.), which have 200 stations, including CATI interviewing.

NFO conducts concept and product tests and tracking, attitude, usage/awareness, and segmentation studies. Standard segmentation systems, including Vision, Acorn, Cluster Plus, Prism and VALS, are used for analysis.

Syndicated services include tracking studies for the beverage industry (SIP), mail-order monitoring (MOMS), toys (Toy-Track), carpeting and men's and women's apparel.

NFO maintains marketing offices in Chicago, St. Louis, Toledo, San Francisco and Greenwich, Conn. There are 336 full-

William E. Lipner
NFO Research

time and 326 regular part-time employees.

NFO recently introduced the following new services: Screen-Test and Kids' Screen Test for presenting products and concepts to panel members for viewing at home via video tape; Analycor, an advanced segmentation model; Converge, a trade-off analysis technique; Confirm, a joint venture with Yankelovich

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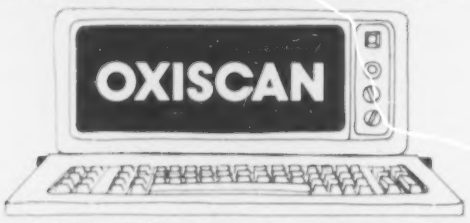

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Top research companies

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NFO/SRG International, White Plains, N.Y., provides access to the AGB Research worldwide group of market research companies and conducts surveys in 35 countries worldwide.

President-CEO William E. Lipner, 39, holds degrees in electrical engineering and business administration from the University of Toledo.

9 **Market Facts,** Chicago. Public corporation traded over the counter; founded in 1946. Revenues in 1986 were $36 million, down 4.6% from 1985.

These figures do not include revenues from Market Facts of Canada (annual volume estimated at $4.8 million), which is 50% owned by MF.

Most of MF revenues come from custom-designed research studies conducted for marketers of consumer goods and services, industrial marketers, and government agencies and associations. However, more attention is being given to syndicated studies developed by the company's Financial Services Group and Healthcare Information Group.

The company conducts studies through numerous data collection facilities—a network of shopping mall interviewing centers (three of which are company owned); a controlled mail panel of 235,000 households; three national telephone interviewing centers with a total of 125 stations (102 CATI-equipped); and the Marketest controlled store auditing facility for new product test marketing and other forms of in-store experimentation.

In 1986, MF launched a weekly telephone omnibus survey called TeleNation, opened a new client service office in St. Louis, and formed a Marketing Models Group to develop sales projection models, trend analyses and other services not already offered through its Decision Systems Group.

Verne B. Churchill
Market Facts

MF employs 487 full-time, salaried employees within its six client service offices and six other operational facilities in the U.S.

President-CEO is Verne B. Churchill, 54, who received his M.B.A. from Indiana University. Greg Spanga, 50, the company's chief operating officer, received his M.B.A from Bernard Baruch College.

10 **NPD Group,** Port Washington, N.Y. Privately held corporation founded in 1953. Revenues in 1986 were $35.5 million, up 7.3% from 1985.

The NPD package Goods Di-

Research growth outpaces advertising agencies

The top 46 research company compilation makes possible a comparison of the growth in worldwide expenditures for marketing/advertising/public opinion research and that of advertising agencies, as compiled in the Advertising Age U.S. Advertising Agency Profiles (March 26).

Agencies vs. research companies	1986 worldwide revenues (millions)	% growth over 1985
Top 46 U.S. advertising agencies	$7,263.0	10.8%
Top 46 U.S. research organizations	1,911.2	16.2

The difference between the two industry growth rates is even more extreme when you consider first that the growth rate of research companies has been adjusted to negate the impact of acquisition as much as possible; if one organization acquired another during 1986, the revenues for both 1985 and 1986 were included before calculating growth rate, or they were eliminated from both years. This is not true of the advertising agency revenues, which are to some degree inflated by acquisition gains.

Second, for research companies, revenues from non-research activities have been subtracted out inasmuch as is possible, so the growth rate is calculated on research revenues alone. This is not true of advertising agencies, where non-advertising activities, including public relations and research subsidiaries, are included.

Third, 27% of the top 46 research companies' revenues came from outside the U.S., compared with 37% of the top 46 advertising agency revenues. Therefore, the agency growth rate was helped more by the weakening of the U.S. dollar in 1986 than was the research rate.

No wonder, then, that in 1986 some very large, worldwide advertising agencies were aggressively acquiring research companies both in the U.S. and abroad. —*Jack J. Honomichl*

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vision operates a 14,500-household national purchase diary panel, plus more than 20 local market test panels with approximately 30,000 additional households. Its NET service provides detailed meal usage information from 2,000 households, and its Marketrax service provides consumer UPC scanner panels and controlled store testing capabilities in three markets. In early 1987, this division placed handheld UPC scanner devices in 500 New York area households as part of a program to replace national mail diaries with electronic UPC-based data collection.

The NPD Special Industry Services Division uses a combination of mail purchase diaries, mail panels and computerized point-of-sale audits to develop syndicated tracking services for non-packaged goods industries, including toys/games, apparel/textiles, petroleum/automotive, sporting goods, jewelry and electronic products.

Currently, the Point-of-Sale Audit program is being expanded to nearly 3,000 department, discount and specialty stores. A similar auto parts program will start later this year. NPD electronic product and sporting goods data bases are part of an international data base available through joint ventures with GfK of West Germany and Tokyo Research Co. of Japan.

Tod Johnson
NPD Research

NPD's Crest Division operates a 13,000-member diary panel reporting on prepared meals purchased away from home. Starting this year, Crest's Market Development Program is being extended to include trade area and site evaluations for restaurant operators.

The NPD Marketing Models Division has proprietary models, such as ESP, for pre-test marketing and new product evaluations. This year, the division added BrandStar, a joint venture with Hendry Corp.

Home Testing Institute, the custom research division of NPD, operates a 200,000-household fixed mail panel and related CRT central telephone interviewing facility.

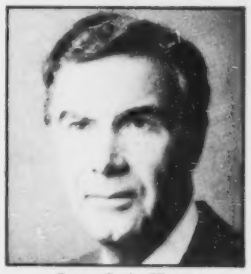
NPD has 455 full-time employees in five U.S. office locations. About $500,000 of its annual revenue comes from outside the U.S.

President-CEO is Tod Johnson, 42, who holds an M.S.I.A. degree from Carnegie-Mellon University. During 1986, founder Henry Brenner, 72, sold his remaining holdings to the corporation.

11 **Westat**, Rockville, Md. An employee-owned corporation founded in 1961. Research revenues in 1986 were $35.2 million, up 39.9% from 1985.

Revenues include those of Crossley Surveys, a subsidiary of Westat since 1983, but do not include those of computing time unrelated to research activities. Westat specializes in large-scale survey research, about 90% of which comes from projects funded by federal agencies.

The staff includes 284 exempt, salaried professionals (up 11% from 1985), a non-exempt, salaried staff of 70, and about 500 part-timers for telephone interviewing. The Crossley Division is located in New York, and during 1986 Westat opened a second telephone interviewing facility in Frederick, Md., and relocated its Rockville facility to new quarters.



Joseph A. Hunt
Westat

President-CEO is Joseph A. Hunt, 51, who has an M.S. from Massachusetts Institute of Technology. During 1986 Edward C. Bryant, 71, founder of Westat, became chairman emeritus; he has a Ph.D. from Iowa State University.

12 **Maritz Marketing Research Inc.**, St. Louis. Wholly owned subsidiary of Maritz Inc., founded in 1973. Revenues in 1986 were $32.9 million, up 9.6% from 1985.

MMRI is primarily involved in custom survey research, but is also well known for syndicated studies in the automotive and agricultural industries. There are nine full-service offices in eight cities: Atlanta, Dallas, Detroit, Los Angeles, Minneapolis, New York, St. Louis and Toledo.

William H. Lewellen
Maritz

In 1986, MMRI opened a field service branch in Columbus,

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Ohio, and a WATS survey center in Toledo. Nationwide, MMRI operates 18 field service branches and four WATS survey centers. Data collection resources include 34 focus group suites, 476 central phone lines, 21 mall interviewing locations and 25 test kitchens. The company's 189-station CATI telephone and mall interviewing system now spans 17 cities.

Product introductions last year included Explorer, decision support software for marketers and researchers, which makes research data bases available on a PC in an easy-to-use format producing custom cross tabulations, graphs and statistical tests. A market segmentation technique based on Vision geodemographic analysis also was introduced.

MMRI plans this year to introduce two new syndicated studies—one related to recent home buyers and another related to the financial industry. Improvements to MIVIS (Maritz Interactive Videodisc Interviewing System) also will be announced soon. Plans for expansion during 1987 include a full-service division in Chicago and a field service branch in Florida.

MMRI has 304 full-time employees, 211 of whom are salaried exempt. Approximately 2,000 part-time interviewers and supervisors are also employed.

President William H. Lewellen, 56, holds an M.S. degree in commerce from St. Louis University.

13 Elrick & Lavidge, Chicago. Founded in 1951 and since 1980 a wholly owned subsidiary of Equifax Inc. Revenues in 1986 were $26.7 million, up 8.5% from 1985.

Figures include revenues from a subsidiary, Quick Test Opinion Centers, a national network of 19 mall-interviewing sites, which account for about one-half of total E&L volume.

E&L specializes in survey research for consumer and business-to-business clients. There are full-service offices in Atlanta, Chicago, Cincinnati, Downers Grove, Ill., Los Angeles, Paramus, N.J., and San Francisco. These offices, together with the company's field facilities, employ a salaried staff of about 237, of whom 180 are exempt, plus 750 part-time employees.

During 1986 E&L opened its seventh full-service office in Los Angeles. The Philadelphia-based Quick Test subsidiary opened a new facility in the Atlanta area and plans to open a telephone interviewing operation during 1987.

E&L continued to expand its data-processing capabilities through upgrades in computer equipment that have increased computer capacity by about 40% so far in 1987.

J. Edward Shrawder
Elrick & Lavidge

President J. Edward Shrawder, 50, received an M.B.A. from the University of Chicago. Robert J. Lavidge, co-founder and former president, is now president emeritus.

14 Yankelovich, Skelly & White/-Clancy, Shulman, Westport, Conn. Wholly owned subsidiary of Saatchi & Saatchi, Plc., London. Research revenues in 1986 were $21.2 million, up 13.6% from 1985.

This organization was formed in January, 1986, when Saatchi & Saatchi merged Clancy, Shulman & Associates (founded in 1982, acquired by Saatchi in 1985) and Yankelovich, Skelly & White (founded in 1958, acquired by Saatchi in 1984). The firm trades under Yankelovich Clancy Shulman (YCS) and is a unit within Saatchi & Saatchi Consulting, a subsidiary of Saatchi & Saatchi Plc.

Robert S. Shulman
Yankelovich

The merged organization now has three business units:

1. Consumer Research. Has syndicated surveys including Monitor, Youth Monitor, and—new in 1987—Pacific Basin Monitor, a shared-cost survey covering Japan, South Korea, Taiwan, Hong Kong, Singapore, Malaysia and Australia. The consumer research unit also offers "market response" assessment research services for every stage of a product's life cycle.

2. Consumer Marketing Consulting. Specializes in product positioning and relaunch, market structure analysis, new product and services development, concept screening and prioritization, acquisition studies and new business analysis, and marketing plan development and optimization.

3. Business-to-Business Research and Consulting. Includes corporate and product position analysis, corporate communications studies, industry segmen-

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tation studies, etc. There are multi-sponsored corporate image surveys of media, brokers, individual investors, portfolio managers, and public opinion surveys, such as the studies published by *Time* magazine.

YCS has 103 full-time employees and, in addition to the Westport headquarters, a research and development staff in Chestnut Hill, Mass., and a sales-service office in Newport Beach, Cal.

President-CEO Robert S. Shulman, 35, is a graduate of Eisenhower College. Chairman Kevin J. Clancy, 44, received his Ph.D. from New York University.

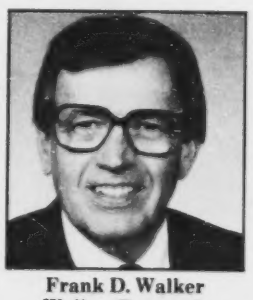
15 **Walker Research**, Indianapolis. Privately held corporation founded in 1964 (succeeding a local interviewing agency, Walker Research Service, founded in 1939). The company's revenues in 1986 were $21.3 million, up 2.6% from 1985.

During 1986, this survey research company reorganized into three strategic business units:

1. Research & Analysis. Provides full-service custom ad hoc research services nationally through client service offices in New York, Winston-Salem, N.C. Cincinnati, Indianapolis and San Francisco.

2. DataSource. Provides data collection, tabulation, data base mangement and computer services through a network of data collection offices in New Jersey, Florida, Indiana, Kentucky and Arizona. Included are more than 240 telephone interviewing stations, most of which are CATI-equipped.

3. Customer Satisfaction Measurements. Specializes in



Frank D. Walker
Walker Research

designing and administering customer satisfaction measurement programs.

An affiliate, Walker Clinical Evaluations, conducts Phase Three clinical investigations and trials of drugs, cosmetics, foods, animal products, medical devices and electronic products.

Walker employs 147 full-time salaried, 153 full-time hourly and 565 part-time workers.

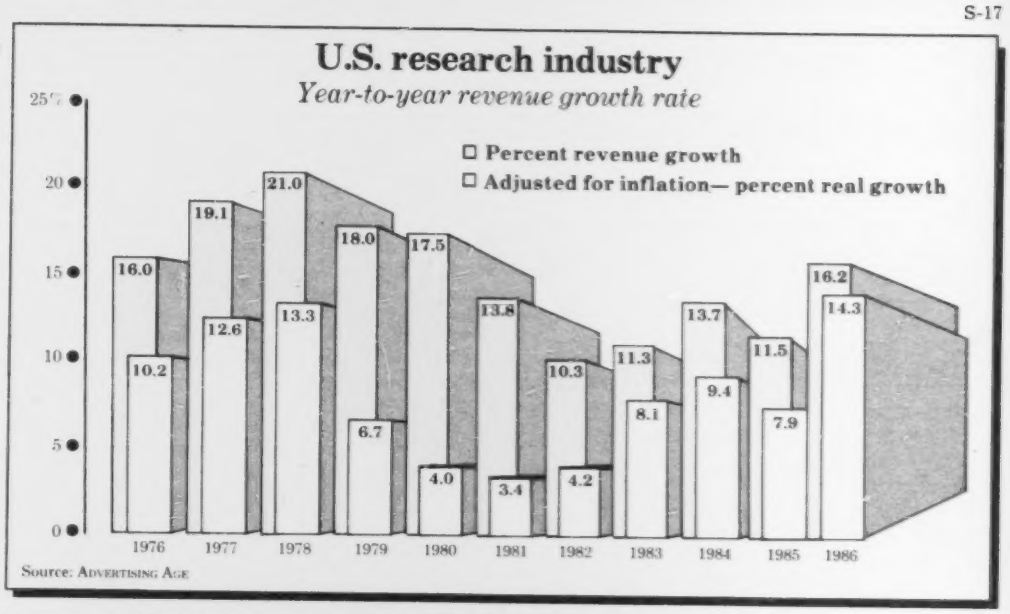
During 1986, Walker sponsored a three-day symposium, RE:2000, for senior marketing information executives.

Chairman-CEO is Frank D. Walker, 52, a graduate of DePaul University. President-chief operating officer is James E. Sammer, 48, who received an M.B.A. from Michigan State University.

16 **Chilton Research Services**, Radnor, Pa. Founded in 1957; a wholly owned subsidiary of Capital Cities/ABC since 1979. Revenues in 1986 were $19.5 million, up 2.1% from 1985.

Chilton, whose core business is ad hoc custom marketing research, maintains business specialty groups in telecommunications, computers, healthcare, financial institutions, consumer package goods, utilities and retailing. There are in-house capabilities for modeling/forecasting and complex statistical analysis. Chilton has 181 full-time, salaried employees.

Chilton's polling unit conducts the ABC election polls as well as monthly opinion polls for



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broadcast on ABC News. In 1986, as part of the November congressional elections, Chilton processed 68,000 exit interviews through Radnor and transmitted the data to ABC News in New York in a single day. Its large-scale data collection is further reflected in the management of 20,000 personal interviews annually for Mediamark Research for their reports on advertising media exposure and purchases of products and services.

Chilton operates dedicated telephone-interviewing centers for customer-service measurement on behalf of the Bell regional operating companies of Ameritech, NYNEX, Bell Atlantic and SNET.

The Chilton field department conducts more than 30,000 personal interviews annually through a national network of more than 1,000 field personnel. Telephone-interviewing facilities for custom research are in Radnor (110 stations) and Havertown, Pa. (72 stations). Its CATI system incorporates on-line sample control, interactive cross tabulations and a flexible software system for computerized questionnaires developed by Chilton and known as the Survey Research Processor.

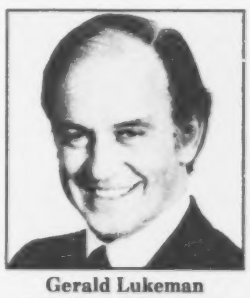
Ronald Hoxter
Chilton Research

A programming development group is dedicated to ongoing innovation in computerized interviewing techniques including auto-dialing and computerized sample dispositioning. There are three 4,300 series IBM mainframes in the Chilton system.

In 1987 Chilton will issue a syndicated research report detailing operating costs and fleet characteristics for private truck fleets.

Ronald Hoxter, 39, vp, general manager and director, has an M.B.A. from Columbia University.

17 **ASI Market Research,** New York. Founded in 1962; since 1983 a wholly owned division of IDC Services, Inc. Revenues in 1986 were $17.1 million, up 8.6% from 1985.



Gerald Lukeman
ASI Market Research

ASI activities are concentrated in two areas: advertising research, which specializes in controlled audience pretesting and on-air testing of TV commercials and testing of print ads, and entertainment research, which specializes in evaluating entertainment projects, including pilots for TV and movie films.

In 1986, ASI continued to expand Tru-Share, a multicity persuasion methodology. Another methodology, Recall Plus, a CATV-based system, is available in 11 cities.

During 1987, ASI plans expansion of its theater operation, presently centered at the Preview House facility in Los Angeles, to include multiple city representation with automated data retrieval and transmission capabilities. It also plans to introduce new syndicated services in the entertainment research area of its business. There are 125 full-time, exempt employees plus an additional 600 part-time staffers.

President-CEO of ASI is Gerald Lukeman, 55, a graduate of Dartmouth College. He is also executive vp of IDC Services.

18 **Decisions Center Inc.,** New York. Privately held corporation founded in 1965. Revenues in 1986 were $15.6 million, up 13% from 1985.

DCI, with 160 full-time salaried employees, includes Decisions Center, Murray Hill Center (three focus-group conference rooms), Express Data Center and Facts Center, a 94-station telephone-interviewing facility. All divisions are in one Manhattan building.

DCI specializes in custom-survey research: large-scale market structure and strategy studies, print and TV copy testing, tracking studies, legal studies and concept and product testing.

DCI's growth in 1986 came from a combination of the expansion of Express Data Center and a newly developed system of copy testing aimed at highly specific and difficult-to-interview target audiences. Express Data Center, providing virtually instant computerized transmission of survey data from a network of mall locations to DCI's VAX 750 computer, expanded from 10 to 16 locations in 1986 and is planning additional expansion in 1987. Further plans include the introduction of a new market-simulation model.

Bernard Ruderman
Decisions Center

DCI is managed by three partners: Bernard Ruderman, 55, who has an M.S. from Pennsylvania State University; Bernard Levine, 61, and Steven Roth, 41, both with M.B.A.s from New York University.

19 **Louis Harris and Associates,** New York. Founded in 1956 and since 1975 a wholly owned subsidiary of Gannett Co. Revenues in 1986 were $15.5 million, down 2% from 1985.

Forty-three percent of Harris revenues come from non-U.S. subsidiaries: Louis Harris International (London), Louis Harris France (Paris) and Louis Harris Medical Surveys (London).

Founded by Louis Harris, the well-known pollster whose column is syndicated in 150 newspapers, the U.S. operation consists of the following divisions:

Louis Harris
Louis Harris and Associates

telecommunications, computers, healthcare, banking and financial services, automobiles, and public policy and corporate affairs. Multiclient surveys track corporate, financial, public and leadership opinions and behavior. About 40% of the company's U.S. work and 20% of the international work is for foundations, governmental agencies and other non-profit entities.

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120 full-time salaried employees and a phone interviewing facility (40 CATI-equipped).

Chairman-CEO Louis Harris, 66, is a graduate of the University of North Carolina at Chapel Hill. President-chief operating officer Humphrey Taylor, 52, is a graduate of Cambridge University (England).

20 **Opinion Research Corp.**, Princeton, N.J. Founded in 1938; since 1975 a wholly owned subsidiary of Arthur D. Little Inc. Revenues in 1986 were $15.2 million, up 4.8% from 1985.

Andrew Brown
Opinion Research Corp.

ORC provides full-service survey research and analytical and design services, emphasizing market research, data collection, awareness, trial and usage studies, corporate reputation and product image, media studies, financial industry, telecommunications, government research, employee relations and public issue research.

ORC is organized into Financial Services Group, Healthcare Research Center, Telecommunications Section and Organizational Research Group. ORC also specializes in multivariate data analysis and market modeling techniques. Several shared-cost surveys are available, including the every-other-weekly General Public Caravan and the quarterly Executive Caravan.

ORC operates a CATI-based system with 125 interviewing stations. Its technical center is a computer-based network that coordinates sample preparation and control, telephone interviewing, data processing and quality assurance. There are 190 full-time salaried employees in Princeton, with branch offices in New York, Washington, Chicago and San Francisco.

ORC this year is planning an expansion of its field and tab business to supplement its full-service research capabilities.

President-CEO Andrew Brown, 42, has an M.B.A. from Temple University and a B.S. from Iowa State University.

21 **Ehrhart-Babic Group**, Englewood Cliffs, N.J. Privately held corporation founded in 1959. Revenues in 1986 were $14.5 million, up 5.1% from 1985.

Louis Babic Jr.
Ehrhart-Babic Group

Ehrhart-Babic Group, with a full-time salaried staff of 97, specializes in custom and syndicated "in-store" research via two divisions: Ehrhart-Babic Custom Research, which uses scanner and traditional audit data to conduct sales measurement studies, including trend audits, controlled store tests and mini-markets across all major classes of retail trade; and National Retail Tracking Index, a syndicated database of regularly scheduled retail-observation audits in more than 8,000 stores nationally, including food, drug, mass merchandise, convenience and hardware/home center outlets. Ancillary services introduced in 1986 were the Annual Comprehensive Survey of 18,000 stores blanketing the U.S. and the Toy Store Observation Index in more than 1,100 stores in 20 metropolitan areas.

In 1987, the National Alcoholic Beverage Index (NABEX) will be spun off as an independent division of EBG. It will provide retail observation data quarterly in more than 2,800 off-premise outlets and semiannually in 3,100 on-premise accounts. The Ehrhart-Babic On-Line System will be expanded to support observation and movement data for both NRTI and NABEX.

Group president is Louis J. Babic Jr., 54, a graduate of Boston University, and chairman is Thomas A. Ehrhart, 62, a Pace University alumnus.

22 **National Analysts**, Philadelphia, founded in 1943 and since 1970 the survey research division of Booz Allen & Hamilton. Revenues in 1986 were $13.3 million, up 38.5% from 1985.

NA conducts custom studies, primarily strategic in nature, for both commercial clients and not-for-profit institutions, including federal, state and local governments. Most of the growth in 1986 was derived from assignments for commercial clients that accounted for approximately 65% of the revenue.

NA's commercial business is organized along industry practice lines, with professional staff specialists in each of the following areas: financial services, information/telecommunications,

Marshall G. Greenberg
National Analysts

pharmaceuticals and medical equipment, utilities, automotive and litigation support. In addition to basic survey research, the company offers group and individual depth interviewing, market segmentation and tradeoff analyses and multivariate modeling.

In 1986, NA expanded its capabilities for collecting survey data interactively on microcomputers and is now using portable laptops to interview respondents in their homes and offices.

The Medicaster, a recently developed forecasting model based on data collected from physi-

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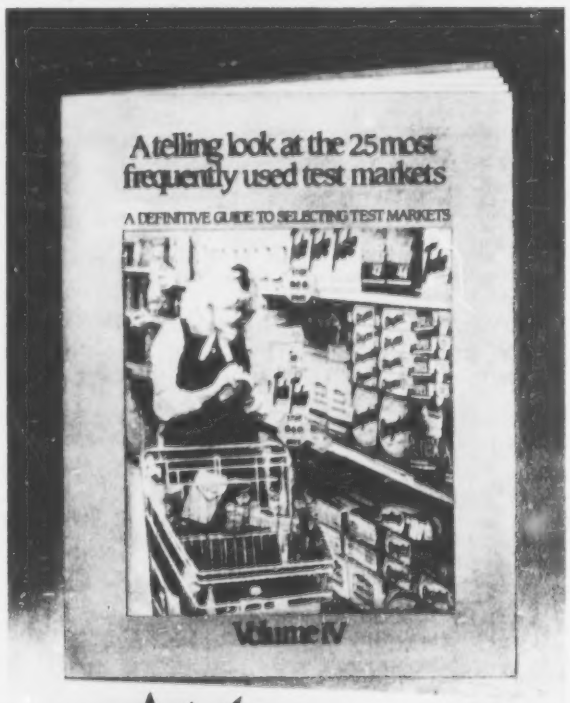

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cians, predicts market share and volume for new health care products. The underlying choice model is currently being extended in the development of forecasting models for other industries including financial services, utilities, telecommunications and transportation.

This year, NA plans to test and introduce a new PC-based interactive data analysis software package. The company has 52 full-time salaried employees and 70 full-time non-exempt employees in its Philadelphia and New York offices.

President is Marshall G. Greenberg, 51, who received his Ph.D. in mathematical psychology from the University of Michigan.

23 **Harte-Hanks Marketing Services Group,** River Edge, N.J. A unit within Harte-Hanks Direct Marketing, which in turn is one of five divisions of Harte-Hanks Communications. Founded in 1975. Research revenues in 1986 were $12.2 million, up 4.6% from 1985.

Included within this group are: RMH Research Inc., a full-service survey company specializing in communications and media research; National WATS Service, a telephone interviewing facility with 75 stations, some CRT-equipped; and Urban Data Processing, a Burlington, Mass.-based EDP service bureau that specializes in custom processing of U.S. Census data for marketing applications.

Richard Hochhauser
Harte-Hanks

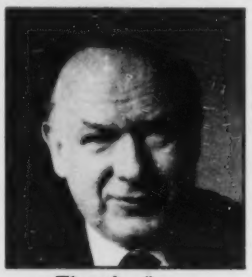
The Marketing Services Group is specializing more in direct marketing research applications, banking and communications/media research. There are 120 full-time salaried employees.

President of the Marketing Services Group is Richard Hochhauser, 42, with an M.B.A from Columbia University. He also is president of Harte-Hanks Direct Marketing.

24 **Mediamark Research,** New York. Founded in 1979; 80% owned by MAI plc., London. Revenues in 1986 were $12.1 million, up 26.6% from 1985.

MRI operates a syndicated/-product research service based on personal interviews with 20,000 adults each year regarding their exposure to advertising media and, via leave-behind questionnaires, purchase data on a broad line of products and services.

Clients—including agencies, advertisers, magazines, newspapers, broadcasters and cable networks—can have on-line access to 25 MRI reports. Also, data are linked to the PRIZM, ACORN and VISION geodemographic systems and the VALS psychographic system.



Timothy Joyce
Mediamark Research

MRI also produces special reports each year based on a two-year data base: a business-to-business report, the Upper Deck (affluent market), plus reports related to the top 10 local markets, including audience data on newspapers and broadcast stations.

In 1986, MRI announced the availability of a new microcomputer system called MEMRI (Micro Evaluation by Mediamark Research Inc.), which enables subscribers to process MRI and other data bases with the respondent data being held on site.

Early this year, MRI announced that its custom studies would be handled by a new division, the Custom House, specializing in studies of special markets, including the recontacting of MRI's existing annual sample to collect additional data.

NabScan Inc. (National Brand Scanning), acquired by MRI in 1985, announced in 1986 a new on-line service providing marketers with sales and price data for UPC-marked items on a weekly basis from a panel of 1,100 scanner-equipped supermarkets. Data are available on a national, regional or local basis.

MRI revenues include those of NabScan; together these organizations have 64 full-time, salaried employees in New York, Chicago and San Francisco offices. Chairman-CEO Timothy Joyce, 53, has a Ph.D. from Cambridge University. President-chief operating officer Alain J. Tessier, 53, has an M.A. from the University of Notre Dame.

25 **Data Development Corp.,** New York. Privately held corporation founded in 1960. Revenues for 1986 were $10.5 million, down 2.7% from 1985.

DDC is a full-service custom-survey organization with 84 full-time salaried employed in two offices: New York (DDC and New York Conference Center) and New Rochelle, N.Y. (the Conference of New Rochelle and the Telephone Center—70 stations, 60 CRT-equipped.)

DDC emphasizes custom research where design and analysis are critical components, such as strategy and market studies, attitude and usage, tracking studies, concept/product and copy testing. Proprietary services include COMBO (product testing), COPY II (copy strategy) and ADOPTER (pre-test market measurement system), a joint venture with Edward Tauber, University of Southern California. Launched in 1986 was "Total Brand Equity," a multivariate approach identify-

Joseph Goldstein
Data Development Corp.

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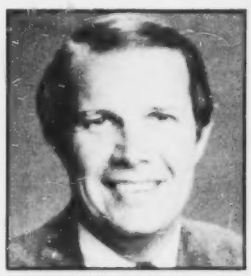
ing corporate equity.

DDC's newest division, Foodservice Research & Marketing, which specializes in institutional foodservice research, features a syndicated service, "MarketScore."

Jerry Rosenkranz is chairman and Joseph Goldstein is president CEO; both are 50 and graduates of City College of New York.

26 **Custom Research Inc.**, Minneapolis. Privately held corporation founded in 1974. Revenues in 1986 were $10.4 million, up 7.2% from 1985.

This custom-survey company with 75 full-time salaried employees (plus 175 part-timers) is organized by divisions: Consumer Research, Medical Research Bureau, Custom Research Telephone (central telephone WATS interviewing, CRT-equipped, with 50 stations), Corporate Services, Custom Research International, and —new in '86—Services, specializing in marketing research for financial institutions, the travel/leisure industry and telecommunications. CRI has four offices, including San Francisco, which opened in 1986.



Jeffery Pope
Custom Research

During 1986, CRI introduced CRT interviewing in 58 mall locations to conduct personal interviews. A regularly scheduled omnibus survey, CRITERION, is used for concept testing.

CRI is managed by two partners, Jeffery L. Pope, 46, who graduated from the Kellogg School of Management at Northwestern University, and Judith S. Corson, 44, a graduate of the University of Minnesota.

27 **Decision/Making/Information**, McLean, Va. Privately held corporation founded in 1969. Revenues in 1986 were $10.4 million, up 55.2% from 1985.

This survey company, with 64 full-time employees (43 of whom are salaried exempt) and 235 part-time employees, is organized around five Strategic Business Units: marketing research, political research, public affairs research (new in 1986), field and data processing.

In addition to the McLean facility, D/M/I has client-service offices in Chicago (new in 1986), Princeton, N.J. and Santa Ana, Cal. The company has a permanent telephone-interviewing facility in Provo, Utah (110 stations, 130 during the political election season).

In 1986, D/M/I had a record level of political research volume. In addition to major work for the White House and Republican National Committee, D/M/I was pollster of record for 65 GOP political campaigns including senatorial, gubernatorial, congressional and state legislative races. Marketing research volume also increased in 1986 and has become a major growth area.

In 1987, D/M/I will introduce two new services: Meccas, a personal values research system for developing and testing advertising strategy, and a research symposium for top corporate leaders called "The Presidents' Quorum."

Founder-chairman Richard B. Wirthlin, 56, has a Ph.D. from

Richard Wirthlin
D/M/I

the University of California at Berkeley. He is best known as President Reagan's political strategist. Thomas B. Hughes, 42, president-chief operating officer, has an M.S. from Wichita State University.

28 **Decision Research Corp.**, Lexington, Mass. Wholly owned subsidiary of Temple, Barker & Sloane founded in 1971. Revenues in 1986 were $9.8 million, up 16.7% from 1985.

This full-service marketing-research company specializes in custom ad hoc survey work for consumer goods and business-to-business marketers. Industry specialization includes computer, telecommunications, professional service companies (including advertising agencies), financial, healthcare, travel and leisure, package goods, utilities and media and direct marketing.

Robert Duboff
Decision Research Corp.

DRC also conducts market-research training seminars emphasizing the interaction between qualitative and quantitative techniques. In addition, DRC

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Our unique, post-exposure persuasion measure doesn't require respondents to express brand preferences prior to viewing, eliminating the risk of viewers becoming brand sensitized and influencing commercial recall.

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Top research companies

conducts jury-simulation work for legal clients, running mock trails during which arguments and appeals are evaluated.

DRC has 52 full-time employees in three offices: Lexington, Mass., Palo Alto, Cal., and New York (through the acquisition of Lieber Attitude Research). The company has a 36-station WATS central telephone facility.

This year the company plans a shared-cost survey service based on chief financial officers and one, The Week-End, pertaining to leisure-time activities.

General manager is Robert Duboff, 38, who received his J.D. from Harvard Law School.

29 Gallup Organization, Princeton, N.J. Privately held corporation founded in 1935. Revenues in 1986 were $9.7 million, up 13.1% from 1985.

This company, best known for the syndicated (100 newspapers) Gallup Poll column, has 140 full-time employees, some located in a WATS telephone facility with 72 stations near Princeton, N.J.

George H. Gallup Jr.
Gallup Organization

Gallup also specializes in quantitative studies and public opinion research. About half of this work is custom ad hoc; the rest comes from syndicated or shared-cost surveys in the areas of financial services, packaged goods, video products, health care, public policy and book publishing.

The company collects data through face-to-face interviewing (national sample, 360 PSUs and about 50,000 interviews a year) and telephone interviewing.

During 1986, Gallup entered a partnership with Applied Science Group, Waltham, Mass., to market EYE-TRAC RESEARCH, an eye-movement measurement technology analying readership of print materials and TV commercials.

Co-chairmen are George H. Gallup Jr., 58, a graduate of Princeton University, and Alec M. Gallup, 56, a graduate of the University of Iowa. Both are sons of the founder. Joint executive officers are Andrew Kohut, 44, a graduate of Seton Hall University, and Leonard A. Wood, 47, who has an M.B.A. from Rider College.

30 Market Opinion Research, Detroit. Privately held corporation founded in 1941. The company's revenues in 1986 were $9.4 million, up 45% from 1985.

This survey research company is organized by divisions: consumer and industrial marketing research; media (especially newspaper) studies; social and public policy research; health care; public utilities; and political.

Because Market Opinion Research president Robert N. Teeter is a prominent Republican political pollster/consultant (Vice President Bush is a client), there is a considerable bump in MOR survey volume during election years, as was the case in 1986.

Frederick P. Currier
Market Opinion Research

MOR has 80 full-time employ-ees, 55 of whom are salaried exempt, plus 150 part-timers. During 1986, MOR opened a fourth central location telephone interviewing facility in Indiana; in total, there are 100 stations, 80 CATI-equipped.

The company has a client service office in Washington.

Chairman-CEO Frederick P. Currier, 63, received his M.A. from the University of Illinois. President Robert N. Teeter, 48, received his M.A. from Michigan State University.

31 Admar Research, New York. Founded in 1960 and since 1985 a wholly owned subsidiary of Sprigg Lane Investment Corp. Revenues in 1986 were $9.4 million, up 5.6% from 1985.

Revenues include those from Market Trends, New York, an affiliated field and tabulating house using a central WATS facility with 28 stations.

Henry Ostberg
Admar Research

Admar specializes in tracking surveys, product testing and advertising studies employing copyrighted methodologies. Including Market Trends, there are 52 full-time employees.

Chairman-president Henry D. Ostberg received his Ph.D. from Ohio State University.

32 Starch INRA Hooper, Mamaroneck, N.Y. Public corporation traded over the counter; founded in 1923. Revenues in 1986 were $9.1 million, up 2.8% from 1985.

Jay Wilson
Starch INRA Hooper

Revenues for Starch, best known for print ad and print media audience studies, include those of the Roper Organization, New York, the Hooper Telephone Interviewing Service, being expanded to 55 stations, and participation in the INRA network of affiliated survey research companies in 24 countries.

SIH has 59 salaried, full-time exempt employees and a total staff of about 150.

During 1986, SIH occupied its completely renovated headquarters building in Mamaroneck and launched an international omnibus service, INRABUS, in eight European countries plus the U.S. During 1987, INRABUS will be expanded to additional countries.

President-CEO of SIH is William J. (Jay) Wilson, 50, a graduate of Yale University. He also heads the INRA organization.

33 National Research Group, Los Angeles. Privately held corporation founded in 1978. Revenues in 1986 were $8.9 million, up 9.9%.

This survey research company, which works almost entirely for the movie industry, specializes in appraising entertainment properties (to audiences of from 100 to 400 moviegoers), studies to develop advertising strategy, and tracking for awareness, imagery and interest.

Catherine Paura
National Research Group

Through offices in London and Tokyo, NRG conducts studies in 12 market countries, with

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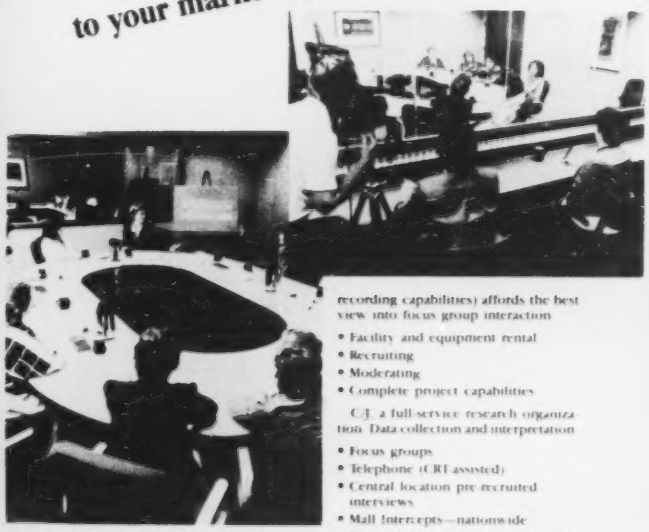

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these overseas activities accounting for 11% of the company's revenues.

There are 200 full-time employees, and in Los Angeles NRG maintains a central telephone interviewing facility with 80 stations, 60 WATS lines.

Co-founder Joseph Farrell, 51, is a graduate of Harvard Law School; he serves as chairman-CEO. Co-founder Catherine Paura, 36, has a B.A. from Brooklyn College; she serves as president-chief operating officer.

34 **McCollum/Spielman Research,** Great Neck, N.Y. Privately held corporation founded in 1968. Revenues in 1986 were $8.4 million, down 2.3% from 1985.

MSR activities are organized by division:

1. AC-T TRIAD—MSR's multi-region, central location advertising research methodology, which to date has been used to study more than 14,000 TV commercials and to develop on-air normative data for clutter awareness, communication, attitude shifts and diagnostics for 1,738 brands in 249 product categories. There are two evaluation models: PAMS (Potential Attitude Motivation Shift), which provides a perspective of how a brand's advertising performs relative to its position in the category, and AD-SIM (Advertising Weight Simulation Model) which addresses this question: "How will brand share and volume be affected as a function of specific advertising and media weight?"

2. PROLOG is MSR's mall research methodology, designed for evaluating advertising, which

Harold M. Spielman
McCollum/Spielman

provides frame-to-frame, real-time reaction to TV commercials, followed by delayed playback of a respondent's non-verbal response to the advertising stimulus.

3. Child Research Services (CRS), which specializes in one-on-one, focus group and large sample studies among children, teens and parents. Studies include communications research, product/taste tests, concept evaluation tracking and parent-child interaction analysis.

Various MSR services now are available in Japan (through International Creative Marketing) and in the German Federal Republic (through GfK-Nuremberg).

The company has 90 full-time salaried employees in four cities.

Chairman of MSR is Donald H. McCollum, 64, who received an M.A. from the University of Denver. CEO Harold M. Spielman, 60, received a B.S.S. degree from City University of New York.

35 **Guideline Research Corp.** New York, privately held corporation founded in 1969. Revenues in 1986 were $7.5 million, up 15.4% from 1985.

GRC, with more than 50 full-time, salaried employees in New York and Los Angeles, includes Guideline Research, Topline Research, Guideline-West and Tabline Tabulating Services. The latter two were started in 1985.

Norman Passman
Guideline Research

GRC specializes in custom market research: concept/product tests, tracking and trade studies, copy research, strategic and image (product and corporate) studies, trademark litigation and advertising claim substantiation studies, as well as the use of magnitude estimation for product development and optimization.

This year, GRC will introduce FLIP (Finding Low Incidence People), a service for conducting research in low incidence categories at a significantly lower cost and in less time than presently available conventional methods.

GRC is jointly headed by president Norman Passman, 54, who has an M.B.A. from Long Island University; Jay Friedland, 47, who has an M.S. from Purdue University; and Leonard Resnicoff, 41, who received his M.B.A. from City University of New York.

First in a series of discussions in the M/A/R/C Symposium.

A Candid Discussion About Database Marketing.

Q: What is the difference between database marketing and traditional direct marketing?

A: Database marketing is the next evolution of direct marketing. The primary difference is the ability to communicate more precisely with different market segments and incorporate the consumer response back into the database. Once the response information becomes part of the file it can be used for segmentation purposes in creating the next direct marketing program. The advances in the data processing industry over the last 10 years have made storing of large amounts of information about prospects and customers much more affordable. The real magic is in the analysis of the data and its application to a particular marketing problem.

Q: I currently employ targeting tactics in my media buys. How will this be different in a database marketing environment?

A: It'll give you the ability to communicate more precisely with identified market segments. Analysis of promotion responders can yield strategic marketing direction.

So, the collective intelligence of the database improves with use. By appending the database with additional information from previous promotions or database overlays, targeting can be refined to much higher levels. Each new promotion or database overlay added to your consumer database provides more marketing variables to segment market niches that have a higher propensity to respond to your offer.

Q: What kind of marketing applications should be considered for database marketing?

A: Categories which have a high degree of switching, are mature, or have well-defined niches are excellent candidates. Examples of programs which work well in a database strategy are competitive and continuity promotion programs, frequent traveler and shopper programs, sales lead generation and business-to-business direct marketing programs.

Q: If you had to describe the biggest difference between M/A/R/C Database Marketing and others, what would it be?

A: There is a big difference between just collecting information and knowing what to do with it. The most important difference is our ability to leverage over 25 years of marketing and consumer research experience to design, develop and implement marketing programs that best suit your needs. It becomes a matter of knowing what to ask, and then knowing what to do with the answers. Database marketing allows you to communicate with each customer on an individual basis and create a dialogue that will continually enrich your market intelligence. As an example, we very often uncover information that points to needed changes in the marketing mix. So, the results of the interpretation of the information can optimize strategic marketing programs. M/A/R/C can also identify cross-selling opportunities, either for existing products and services or for new introductions. And, you can use it as a tool to outmaneuver your competition's marketing strategy in as many or as few markets as you choose. With M/A/R/C Database Marketing, pre-emptive planning will become the norm because you will have quantified knowledge of the category consumer base.

Q: Isn't database marketing going to make an already expensive advertising vehicle even more so?

A: The true benefit of database marketing is that it optimizes each marketing program that you run. As mass media costs rise and response to these programs gets harder to quantify, the need for measurable marketing solutions increases. The ability to fine tune your targeting, so you only reach those prospects which have a high probability of responding, can dramatically reduce your costs while improving your volume. M/A/R/C can provide a turnkey test of database marketing with your brand or service for less than $100,000.

Q: I know M/A/R/C has a great reputation in custom research, but I imagine you use a service bureau for database management. Don't you?

A: No. Most direct marketing agencies do use a service bureau. M/A/R/C is unique. Information has long been our business and our state-of-the-art computer capabilities enable us to do everything in-house. We think it is the only way to offer clients a formula for success where one plus one equals four.

M/A/R/C has a long history of proactive client service. We have been dedicated for the past two decades to working with clients to understand and create the best product or service mix to sell in changing market conditions. This expertise and dedication to service are carried forward into our newest service, database marketing. When you think about it, an integrated system customized to meet your individual needs – a system that's capable of revolutionizing your marketing strategy – is a powerful concept.

Q: OK. You've got my attention. How do I find out more about M/A/R/C Database Marketing?

A: Call Ken Orton at 1-800-527-2680 or return the coupon.

☐ *Yes, I want to arrange an interview to find out how effective M/A/R/C Database Marketing can be for my company.*
☐ *I'm interested, but before we meet, call me at my office.*

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36 **Response Analysis Corp.**, Princeton, N.J. Privately held corporation founded in 1969. Research revenues in 1986 were $6.9 million, down 9.3% from 1985.

Revenues do not include RAC's ARRO Division in Bethesda, Md., specializing in human factors and performance evaluation/skill testing procedures.

RAC concentrates on commercial research (especially multisponsor and custom studies in financial services, healthcare and telecommunications), in litigation support, in large-scale survey research projects for government agencies, and, with its Washington Division, in studies of organizational effectiveness for companies and government agencies. During 1986, RAC was awarded a $14.2 million contract by the Energy Information Administration of the U.S. Department of Energy.

Herbert I. Abelson
Response Analysts

RAC maintains a telephone interviewing facility in Princeton and in 1986 opened a second telephone facility in Hamilton Township, N.J. There are more than 100 full-time employees.

CEO Herbert I. Abelson, 61, received his Ph.D. from the University of Maryland.

37 **J.D. Power & Associates**, Westlake Village, Calif. Privately held corporation founded in 1968. Revenues in 1986 were $6.1 million, up 5.2% from 1985.

J.D. Power
J.D. Power & Associates

Power is a full-service marketing information/research and consulting company specializing in the domestic and international automotive market. It conducts single-client proprietary research as well as independently funded subscriber surveys.

Besides consultancies, other activities include annual owner-satisfaction surveys of passenger cars and light trucks; sponsorship of the Super Dealer Roundtable, consisting of the top U.S. new car dealers; and professional conferences for allied industries.

Two publications—Power Report and the Power California Market Report—are widely read in the automotive industry. Their content, based on survey data, is quoted in trade and mass market media.

In 1986, Power conducted its first light truck media study and announced plans to link with Data Resources Inc. (DRI) in some joint venture forecasting projects. There are 33 salaried, exempt employees and 14 salaried, non-exempt employees.

President is J. David Power III, 55, who holds an M.B.A. from the Wharton School, University of Pennsylvania.

38 **Ad Factors/Millward Brown**, Glen Ellyn, Ill. Founded in 1975; since 1986 a wholly owned subsidiary of Millward Brown Plc., Warwickshire, England. Revenues in 1986 were $5.9 million, unchanged from 1985.

Ad Factors specializes in custom consumer and industrial

Robert Meyers
Ad Factors

survey research through three client service offices: Glen Ellyn, Monroe, Conn. and Riverside, N.J. There is a central telephone interviewing operation in each of these offices plus a fourth in Rockford, Ill. Ad Factors has more than 200 WATS dialing stations, 110 of them CRT-equipped. Ad Factors also conducts mall intercept studies. There are 300 employees, 42 of whom are full-time, salaried.

Ad Factors conducts continuous tracking studies, large-scale category profile studies, test market evaluations, in-home new product testing and custom opinion/attitude/viewership studies. In 1986, before being acquired by Millward Brown, Ad Factors divested its Telefactors Marketing Services Division, which specialized in telemarketing.

This year, Ad Factors began U.S. marketing of a continuous tracking system originally developed by Millward Brown for use in the U.K.

President-CEO of Ad Factors/Millward Brown is Robert D. Meyers, 38, who has a B.S. degree from Loyola University, Chicago.

39 **Marketing Research Services Inc.**, Cincinnati. Privately held corporation founded in 1973. Revenues in 1986 were $5.8 million, up 13.7% from 1985.

This full-service marketing research company provides custom research studies to consumer packaged goods/industrial manufacturers and service organizations. MRSI recently formed a unit specializing in research for service industries including grocery/drug retail, fast food, travel and energy.

Edward Horgan
MRSI

MRSI data collection capabilities include a 125-station, all CRT-equipped WATS center, a high-traffic mall facility in Cincinnati and a staff of traveling supervisors for auditing subcontracted studies across the U.S. Plans call for expansion of this data collection network during 1987.

In-house Digital VAX computers drive Quantime software for CRT interviewing and tabulation/statistical testing. During 1986, MRSI introduced two new applications of technology: Access, an interactive tabulation package that allows clients to dial into the company's computers for real-time topline information and cross-tabs and Autodial, a computerized sample management and mechanized telephone dialing system that enhances productivity by as much as 50%.

MRSI employs more than 90 salaried, full-time personnel (50 exempt) and 200 part-time employees in the company's recently expanded and remodeled 26,000 square foot headquarters in Cincinnati.

Founder Edward D. Horgan,

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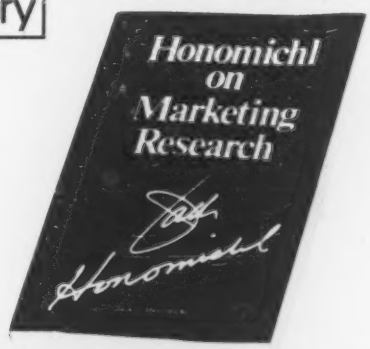

You know Jack Honomichl. He's president of Marketing Aid Center, Inc., Advertising Age's lead marketing research writer and author of MARKETING/RESEARCH PEOPLE: THEIR BEHIND THE SCENES STORIES.

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Top research companies

44, is president/CEO; he did graduate work at Xavier University.

40 **Oxtoby-Smith,** New York. Privately held corporation founded in 1956. Revenues in 1986 were $5.8 million, up 16% from 1985.

This survey research company, with 65 full-time, salaried employees, is distinctive in that about 60% of its revenues come

Joseph Smith
Oxtoby-Smith

from clients for whom O-S assumes major responsibility for the consumer research function, both as consultant and research supplier. Among such clients currently are American Motors, Block Drug, MCI Telecommunications and Seagram.

The balance of O-S revenues comes from custom ad hoc survey projects, consultation, and research and testimony relating to legal matters, including trademark litigation and advertising claim substantiation.

On-site facilities include a central telephone interviewing facility with 20 stations, all CRT-equipped, and a focus group operation.

President-CEO Joseph Smith, 60, received his Ph.D. from the University of Iowa.

41 **Birch Research Corp.,** Coral Springs, Fla. Founded in 1978; a privately held corporation but, effective last June, minority interest in Birch was acquired by VNU/Amvest, the U.S. subsidiary of United Dutch Publishing Companies (VNU). Revenues in 1986 were $5.8 million, up 25.4%

Thomas C. Birch
Birch Research

from 1985.

Birch's main activity, through Birch Radio Ratings, New York, is the development of telephone interview-derived radio audience ratings; 96 markets are measured on a continuous, year-round basis, with another 134 measured periodically.

All interviewing is conducted through three centralized WATS centers (Coral Springs and Sarasota, Fla., and new in 1987, San Antonio), which have more than 200 stations. There are about 150 salaried employees, plus about 450 part-time staffers.

Regional sales offices are located in Los Angeles, Chicago, Dallas and Atlanta. In September 1986, Birch moved into a $1.5 million corporate headquarters in Coral Springs.

During 1986, Birch Radio started 28-day measurement in major markets, changed to a seasonal quarter reporting cycle and beefed up weekend sample sizes. Also, Birch started to use Nielsen's NSI Total Telephone Frame samples in all measured markets.

This year, Birch plans to put all data collection on CATI systems.

Founder, chairman and CEO of Birch is Thomas C. Birch, 34, a graduate of Cornell University. President-chief operating officer is William P. Livek, 33, a graduate of Southern Illinois University.

42 **Newman-Stein,** New York. Privately held corporation founded in 1974. The company's revenues in 1986 were $5.3 million, up 4.9% from 1985.

Newman-Stein consists of the main offices in New York, the newly formed Newman-Stein, Inc., a California company located in San Francisco, and

Lawrence Newman
Newman-Stein

Shelf Power, a standardized package design testing company co-founded in 1986 with DGM Inc.

The company has 50 full-time salaried employees.

NSI specializes in providing consumer research services in the areas of concept, product, package and advertising testing, tracking studies, and all elements of strategic research—attitude, image and market segmentation studies. The company also offers complete qualitative research services, including focus groups and one-on-ones.

NSI is jointly headed by president Lawrence Newman, 47, a graduate of City College of New York, and William Stein, 48, who holds an M.S. degree from Yeshiva University.

The extraordinary growth is illusory because the list is heavily weighted by four organizations that have a large percentage of their volume coming from outside the U.S.

43 **Field Research Corp.** San Francisco. Privately held corporation founded in 1946. Revenues in 1986 were $5.2 million, up 28% from 1985.

This full-service custom survey company has 50 full-time salaried employees in two offices —San Francisco and Los Angeles—of whom 18 comprise the professional staff.

Most FRC clients come from

Aaron Levy
Field Research Corp.

these fields: public utilities, oil companies, financial services, health services, consumer products and services, print and broadcast media, retail chains, high-tech companies, state government agencies and law firms.

FRC uses all systematic data gathering methods. It maintains central location telephone centers in San Francisco and Los Angeles with 75 interviewing stations, the majority CATI-equipped. Its state-of-the-art data processing installation is centered on two VAX 11/750 computers, the UNIX operating system and a variety of multivariate and other software programs.

During 1986 Field Research enlarged its senior and intermediate professional staff, added a second VAX 11/750 computer to accommodate greatly increased data processing and CRT interviewing volume, and significantly expanded its graphics and word processing capabilities. The San Francisco headquarters will be enlarged this year.

The Field Institute operates the California Poll, a nationally respected public opinion news service in continuous operation since 1947. The institute's activities account for about 10% of FRC's annual billings.

Marvin Field, 65, is founder and chairman of FRC, and Aaron Levy, 52, a graduate of San Jose State University, is president-CEO.

44 **Lieberman Research West,** Los Angeles. Privately held corporation founded in 1973. Research revenues in 1986 were $5.2 million, down 12.7% from 1985.

Included this year are LRW revenues from a subsidiary, Interviewing Service of America. Revenues from telemarketing operations are not included.

A full-service, custom re-

Michael Liebergall
Lieberman Research West

search organization with 40 full-time salaried employees, LRW conducts copy, concept and product testing, tracking and strategic market studies. It specializes in package goods, fast food, healthcare and the entertainment industry (pre-testing movie and TV pilots).

ISA, a 50-station WATS interviewing organization, will expand its capabilities to become a full-service field and tab operation; CRTs are now being installed. There are plans to add a focus group facility in Los Angeles this year.

LRW is managed by two partners: Chairman Arnold Fishman, 42, a graduate of Brooklyn College, and President Michael Liebergall, 40, who attended New York University. Seymour Lieberman is a consulting partner; he received his Ph.D. from the University of Michigan.

45 **Kapuler Marketing Research,** Arlington Heights, Ill. Privately held corporation founded in 1974. Revenues in 1986 were $5.1 million, up 6% from 1985.

Kapuler's full-time salaried staff of 35 (plus 250 part-timers)

Stanley Kapuler
Kapuler

provides a broad range of quantitative and qualitative custom marketing research services. UniFocus, a one-on-one, in-depth interviewing and analytical system, is used for advertising and campaign development and analysis.

Later this year, Kapuler plans to introduce TelePanel, a national probability telephone-generated base of households screened for demographics, category usage and willingness to participate in telephone marketing research.

The Kapuler Survey Center has 120 WATS stations; there is also extensive use of mall intercept interviewing. Kapuler also has an office in Los Angeles.

President Stanley J. Kapuler, 46, received his M.B.A. from the University of Chicago.

46 **Total Research Corp.,** Princeton, N.J. Founded in 1975; since March, 1987, a public company listed NASDAQ. Revenues in 1986 were $5.0 million, up 48.4% from 1985.

This custom ad hoc survey research company with 64 full-time salaried employees began in 1986 to emphasize proprietary, standardized packages of advanced statistical research and analysis techniques, specifically:

PEMS (Price Elasticity Measurement System), to evaluate pricing strategies.

AD/OPT (Advertising Optimization), the modeling of various complex advertising platforms.

Lorin Zissman
Total Research Corp.

CSM (Competitive Share Model), to predict the effect of product line extension or product elimination on a client's own market shares and those of competitors.

COMPASS (Components Assessment), to analyze the structure of a competitive market and determine the effect product attributes have on purchase decisions.

TRC operates two central telephone interviewing facilities (Princeton and Tampa, Fla.), which total 76 CATI-equipped stations. There are focus group facilities in both offices.

Founder and president Lorin Zissman, 56, is a graduate of Temple University. AA

Executive editor Robert Goldsborough coordinated this Research Business Review.

Coming

Next week AD AGE's Special Report will focus on **Direct Marketing.**

1987 EDITION

FOREIGN AGENCY REPORT

Dentsu regains top ranking

An Advertising Age roundup

Riding the yen's surge against the dollar, Dentsu Inc. has overtaken Young & Rubicam as the world's largest advertising agency.

Dentsu reported 1986 gross income of $681 million on billings of $5.31 billion. Y&R came in second after two consecutive years in the No. 1 spot, reporting $628.4 million gross income on billings of $4.19 billion in the 25th annual Advertising Age Foreign Agency Income survey. The survey includes 970 agencies in 72 countries.

Saatchi & Saatchi Compton Worldwide moved from sixth place to third, with gross income of $490.5 million on billings of $3.32 billion. S&SC figures include McCaffrey & McCall and other U.S. shops acquired by parent Saatchi & Saatchi Co. PLC.

In the race for billings leadership among agency holding companies, Saatchi & Saatchi PLC, comprising S&SC, Ted Bates Worldwide, Backer & Spielvogel, DFS Dorland Worldwide and U.K.-based KHBB (formerly KMP Humphreys Bull Barker), supplanted Interpublic Group of Cos. as the leader with gross income of $1.21 billion on billings of $8.26 billion.

Interpublic comprises McCann-Erickson, SSC&B:Lintas Worldwide, Campbell-Ewald Worldwide, Dailey & Associates and 70% of Lowe Marschalk (30% is held by Lowe Howard-Spink & Bell PLC). It had gross income of $822.4 million on billings of $5.55 billion.

From 1973 to 1983, Dentsu ranked as the world's biggest agency, measured in dollars. It lost the ranking to Y&R in 1984 by a slim margin of $11.6 million in gross income and fell to No. 3 in 1985 as the dollar strengthened compared with other currencies.

In 1986, Ted Bates Worldwide held onto its No. 4 ranking with gross income of $486 million on billings of $3.26 billion.

Fifth place again belonged to J. Walter Thompson Co., which had gross income of $471 million on $3.14 billion in billings.

Ogilvy & Mather Worldwide's 1986 ranking of sixth place, down from second in 1985, was due to a change in O&M's reporting procedure. The 1985 ranking was actually for the Ogilvy Group, a holding company that includes Scali, McCabe, Sloves and Cole & Weber. O&M Worldwide, on a year-to-year basis, had a healthy 14.2% growth in gross income and a 14.6% increase in billings.

BBDO Worldwide and McCann-Erickson held onto their No. 7 and No. 8 rankings, respectively. BBDO's gross income was $445.1 million on $3.26 billion in billings; McCann-Erickson had $427.7 million in gross income and billings of $2.85 billion.

Doyle Dane Bernbach and Needham Harper Worldwide, which last year as separate companies appeared in 13th and 19th places, respectively, joined forces as DDB Needham Worldwide and landed in the No. 9 spot, showing gross income of $375 million on $2.56 billion in billings. DDB Needham edged out last year's ninth-largest agency, D'Arcy Masius Benton & Bowles, which rounded out the top 10 with gross income of $336.3 million on $2.26 billion in billings.

U.S. agencies with a large percentage of billings generated by overseas units did well last year. For example, HCM (49% owned by Y&R and 51% by French group Eurocom), with 75.4% of its billings abroad, moved to No. 20 from No. 25.

As was the case in 1985, TBWA Advertising had the largest percentage of billings abroad in 1986, 76.9%, compared with 73.4% a year earlier. It advanced in the rankings one step, from No. 34 to No. 33.

Agencies breaking into the top 50 this year included Asahi Advertising, Tokyo, at No. 45; Hill, Holliday, Connors, Cosmopulos, Boston, at No. 48; and W.B. Doner & Co., Southfield, Mich., at No. 50.

Among agency holding companies, Omnicom Group—which includes BBDO and DDB Needham—ranked No. 3 in 1986 with $820.1 million in gross income on $5.82 billion in billings. JWT Group (which, besides the Thompson agency, owns Lord Geller Federico Einstein) was the fourth-largest, and Ogilvy Group was No. 5.

Rounding out the top 10 agency holding groups were Eurocom, Lowe Howard-Spink & Bell, WCRS Group, Alliance International and Mojo MDA. Advertising Age's International Agency of the Year *(see story, Page 1)*.

WCRS Group, based in the U.K., began its rapid international growth last year with the purchase of Della Femina, Travisano & Partners and HBM/Creamer in the U.S. Della Femina, No. 43 in 1985, fell out of the top 50 this year and HBM/Creamer dropped from No. 36 to No. 46.

Next year's rankings will reflect the February purchase by WCRS of The Ball Partnership in the Asia/Pacific region from O&M for $11 million (AA, Feb. 16).#

AGENCY INCOME REPORT

This year Advertising Age has added a column in the country charts indicating equity holdings by multinational agencies. The abbreviations used in this column translate as follows:

MJ—majority owned, 51% to 100%
MN—minority owned, 1% to 50%
NE—no equity—affiliation or association
NA—not applicable—locally owned
JV—joint venture—50/50

World's top 50 ad agency groups in 1986

Rank		Agency	Gross income	Billings
1.	(3)	Dentsu Inc.	$681.0	$5.31 bill.
2.	(1)	Young & Rubicam[1]	628.4	4.19 bill.
3.	(6)	Saatchi & Saatchi Compton Worldwide[2]	490.5	3.32 bill.
4.	(4)	Ted Bates Worldwide[3]	486.0	3.26 bill.
5.	(5)	J. Walter Thompson Co.[4]	471.0	3.14 bill.
6.	(2)	Ogilvy & Mather Worldwide[5]	459.6	3.15 bill.
7.	(7)	BBDO Worldwide[6]	445.1	3.26 bill.
8.	(8)	McCann-Erickson Worldwide[7]	427.7	2.85 bill.
9.	(—)	DDB Needham Worldwide[8]	375.0	2.56 bill.
10.	(9)	DMB&B[9]	336.3	2.26 bill.
11.	(10)	Foote, Cone & Belding Communications[10]	323.0	2.15 bill.
12.	(14)	Hakuhodo International	309.6	2.27 bill.
13.	(12)	Grey Advertising[11]	309.1	2.06 bill.
14.	(11)	Leo Burnett Co.	292.3	2.06 bill.
15.	(15)	SSC&B:Lintas Worldwide[12]	237.0	1.65 bill.
16.	(16)	Bozell, Jacobs, Kenyon & Eckhardt	175.6	1.25 bill.
17.	(20)	DFS Dorland Worldwide[13]	165.1	1.21 bill.
18.	(21)	N W Ayer	125.5	901.3
19.	(23)	Publicis International	119.6	792.4
20.	(25)	HCM	106.0	723.0
21.	(22)	Wells, Rich, Greene	99.7	665.2
22.	(26)	Dai Ichi Kikaku	98.7	724.3
23.	(17)	Campbell-Ewald Worldwide[14]	87.6	584.2
24.	(30)	Tokyu Advertising Agency	83.8	647.0
25.	(28)	Daiko	82.0	693.7
26.	(35)	Roux, Seguela, Cayzac & Goudard[15]	$80.3	$552.2
27.	(32)	Scali, McCabe, Sloves[16]	77.5	556.6
28.	(27)	Ketchum Communications	75.3	528.5
29.	(24)	William Esty Advertising	75.0	510.0
30.	(39)	Belier Group	72.7	484.6
31.	(—)	Ogilvy & Mather Direct Response	68.0	454.0
32.	(29)	Backer & Spielvogel	68.0	453.3
33.	(34)	TBWA	65.7	453.5
34.	(37)	Ross Roy Inc.	62.4	416.0
35.	(—)	Lowe Marschalk Worldwide[17]	57.8	400.4
36.	(33)	Campbell-Mithun	57.1	380.2
37.	(—)	I&S Corp.[18]	51.8	398.6
38.	(50)	Asatsu	51.1	400.7
39.	(40)	DYR Worldwide	50.7	347.1
40.	(46)	Wunderman Ricotta & Kline	49.1	327.5
41.	(47)	Yomiko	48.9	361.8
42.	(45)	GGK[19]	47.9	337.3
43.	(38)	Chiat/Day Advertising	47.1	314.1
44.	(41)	Tracy-Locke	46.2	316.5
45.	(—)	Asahi Advertising	44.6	280.5
46.	(36)	HBM/Creamer	40.1	267.0
47.	(49)	Laurence, Charles, Free & Lawson	39.4	287.0
48.	(—)	Hill, Holliday, Connors, Cosmopulos	39.4	262.5
49.	(31)	C&W Group	38.4	274.3
50.	(—)	W.B. Doner	36.3	238.2

Included in figures:

[1]**Young & Rubicam**: HCM (49%), DYR (50%), Wunderman Ricotta & Kline, Sudler & Hennessey, Stone & Adler, Creswell, Munsell, Fultz & Zirbel.

[2]**Saatchi & Saatchi Compton Worldwide**: McCaffrey & McCall, Rumrill-Hoyt, Klemtner Advertising, Fairfax Advertising, Cochrane Chase Livingston. The holding company, Saatchi & Saatchi plc, reported world gross income of $1.21 billion on billings of $8.26 billion for 1986.

[3]**Ted Bates Worldwide**: William Esty, Campbell-Mithun, AC&R Advertising, Diener/Hauser/Bates, Kobs & Brady Advertising, Sawdon & Bess Advertising, Stern Walter/Earle Ludgin.

[4]**J. Walter Thompson Co.**: Brouillard Communications.

[5]**Ogilvy & Mather Worldwide**: Ogilvy & Mather Direct Response, Rolf Werner Rosenthal.

[6]**BBDO Worldwide**: Tracy-Locke, Doremus Porter Novelli, Ingalls Quinn & Johnson, MARCOA DR Group, Lavey/Wolff/Swift, Frank J. Corbett Inc., Blair/BBDO, Franklin Spier Inc., Caravetta Allen Kimbrough/BBDO.

[7]**McCann-Erickson Worldwide**: Part of the Interpublic Group of Cos., New York, which reported world gross income of $822.4 million on billings of $5.55 billion.

[8]**DDB/Needham Worldwide**: Cargill Wilson & Acree, Baxter, Gurian & Mazzei, Kallir, Philips, Ross.

[9]**D'Arcy Masius Benton & Bowles**: Medicus Intercon International.

[10]**Foote, Cone & Belding Communications**: Albert Frank-Guenther Law, Vicom/FCB.

[11]**Grey Advertising**: Gross Townsend Frank Hoffman.

[12]**SSC&B:Lintas Worldwide**: Part of Interpublic Group of Cos. (see footnote 7)

[13]**DFS Dorland Worldwide**, fully owned by Saatchi & Saatchi plc.

[14]**Campbell-Ewald Worldwide**'s operations are completely U.S.-oriented after having divested themselves of overseas operations to Lowe Marschalk last year. Both agencies are part of the Interpublic Group of Cos.

[15]**Roux, Seguela, Cayzac & Goudard**: includes offices in Austria, Belgium, France (Paris and regional offices), Germany, Netherlands, Italy, Spain, Sweden, Switzerland, the U.K. Also, RSCG Export, which does business in Africa, the Middle East and French Caribbean) and Creative Business International.

[16]**Scali, McCabe, Sloves**: Martin Agency, Fallon McElligott.

[17]**Lowe Marschalk Worldwide** Interpublic New York, holds 70% equity; Lowe Howard-Spink & Bell PLC, London, has the other 30%. Included: Lowe Howard-Spink U.K., and offices in Australia, Austria, Belgium, Canada, France, Germany, Italy and Netherlands.

[18]**I&S Corp.**: Formerly Dai-Ichi Advertising, Tokyo, which merged Oct. last year with SPN Co., a communications and sales promotion company of the Seibu Saison Group.

[19]**GGK Holding**: offices in Switzerland (headquarters in Basel), Austria, Germany, France, Netherlands, Spain, Italy and Brazil.

Parentheses indicate 1985 ranking. Figures are in millions of dollars.

Source: Compiled by Advertising Age.

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986 ($000; national currency)	Employes 1986	Employes 1985	Employes Percent change	Number offices
ARGENTINA												**Exchange rate: 1.184 austral**	
J. Walter Thompson Argentina	Buenos Aires	MJ	6,164.7	3,014.8	N/A	41,118.6	20,099.6	A5,206.7	A34,728.5	144	137	5.0	1
Ricardo de Luca Publicidad	Buenos Aires	NA	3,232.3	2,523.2	N/A	21,548.8	16,821.0	2,730.0	18,200.0	100	100	0.0	1
David Ratto S.A.	Buenos Aires	MN	2,868.8	1,778.2	N/A	13,919.7	7,644.7	2,423.0	11,756.5	65	67	-3.0	1
Casares Grey	Buenos Aires	MN	2,723.2	1,890.4	N/A	18,163.7	12,608.7	2,300.0	15,341.0	74	69	7.0	2
Ortiz Scopesi y Cia.	Buenos Aires	MN	2,639.1	1,682.3	N/A	17,594.0	11,214.5	2,229.0	14,859.8	90	74	22.0	1
Gowland Publicidad	Buenos Aires	NA	2,379.8	3,540.4	N/A	15,865.6	14,562.2	2,010.0	13,400.0	89	78	14.0	1
Verdino, Funes, Straschnoy & Dreyfus	Buenos Aires	NA	2,310.7	1,236.7	N/A	9,037.8	3,993.7	1,951.6	7,633.3	45	42	7.0	1
Lautrec S.A.	Buenos Aires	NE	2,298.1	1,281.6	N/A	10,445.2	5,824.9	1,941.0	8,822.0	80	73	10.0	1
McCann-Erickson	Buenos Aires	MJ	1,740.5	1,334.5	N/A	11,606.0	8,900.7	1,470.0	9,805.0	55	66	-17.0	N/A
Pragma/FCB	Buenos Aires	MN	1,713.6	1,194.3	N/A	11,429.5	7,966.1	1,447.3	9,653.3	55	55	0.0	1
Cicero/Ted Bates Publicidad	Buenos Aires	NE	1,539.2	594.0	N/A	9,661.4	4,489.1	1,300.0	8,160.0	N/A	40	N/A	1
Leo Burnett Co.	Buenos Aires	MJ	1,426.0	1,171.1	N/A	9,504.0	7,764.9	1,204.0	8,027.0	36	34	6.0	1
SSC&B:Lintas	Buenos Aires	MJ	1,316.6	815.9	N/A	9,373.4	6,413.3	1,112.0	7,916.8	44	43	2.0	1
Colonnese y Asociados	Buenos Aires	NA	1,086.9	562.9	N/A	6,038.4	3,127.1	918.0	5,100.0	N/A	49	N/A	1
Young & Rubicam de Argentina	Buenos Aires	MJ	841.0	450.0	N/A	5,609.0	3,004.0	710.6	4,737.4	31	24	29.0	N/A
Yuste Publicidad	Buenos Aires	NA	815.8	1,310.4	N/A	4,080.2	6,331.1	689.0	3,446.1	45	56	-20.0	N/A
Ayer Vasquez	Buenos Aires	MN	775.0	521.2	N/A	3,000.0	2,893.5	654.6	2,533.8	N/A	N/A	N/A	1
H.G. Solanas y Asociados	Buenos Aires	NA	734.1	953.2	N/A	3,670.4	4,766.0	620.0	3,100.0	20	18	11.0	1
Johnson/B&B	Buenos Aires	MN	623.0	594.3	N/A	3,480.0	3,381.8	526.0	2,938.5	24	30	-20.0	1
Rainuzzo Propaganda	Buenos Aires	NA	618.1	1,056.6	N/A	3,502.0	4,904.2	522.0	2,957.8	24	29	-17.0	1
With Argentinian agencies, AA altered its procedure of determing an agency's "real growth" (applying 1986 exchange rates to 1985 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1985 are based on the average annual exchange rate (1.602) for that year.													
AUSTRALIA												**Exchange rate: 0.6769 A dollar**	
George Patterson	Sydney	MJ	33,168.1	27,076.0	23.0	209,839.0	175,994.0	A$49,000.0	A$310,000.0	420	446	-6.0	4
Clemenger Australia	Melbourne	MN	29,347.5	25,580.4	15.0	183,422.1	159,877.8	43,355.8	270,973.6	N/A	488	N/A	14
Mojo MDA	Sydney	MJ	20,956.0	16,787.1	25.0	130,974.9	104,919.5	30,958.8	193,492.2	346	380	-9.0	8
Young & Rubicam Australia	Sydney	MJ	17,916.9	13,787.1	30.0	120,053.0	92,383.0	26,469.0	177,354.3	379	333	14.0	4
Ogilvy & Mather	Melbourne	MJ	17,440.0	17,326.0	1.0	116,327.0	115,564.0	25,765.0	171,853.0	364	452	-19.0	14
USP Needham Australia	Sydney	JV	16,064.9	14,827.5	8.0	107,153.9	98,900.5	23,733.0	158,301.0	265	244	9.0	5
McCann-Erickson	Sydney	MJ	15,301.0	14,593.0	5.0	102,058.0	97,335.0	22,605.0	150,775.0	277	344	-19.0	N/A
DMB&B	Sydney	MJ	14,630.5	13,787.8	6.0	96,743.8	90,949.6	21,614.0	142,921.8	287	316	-0.9	5
Fortune Communications Holdings	Sydney	NA	11,507.3	12,285.7	-6.0	70,397.6	81,904.9	17,000.0	104,000.0	N/A	340	N/A	5
Leo Burnett Ltd.	Sydney	MJ	9,385.0	9,789.0	-4.0	62,571.0	65,281.0	13,865.0	92,439.0	205	225	-9.0	4
Neville Jeffress Advertising	Sydney	NA	9,087.9	7,107.5	28.0	60,582.6	47,383.0	13,425.0	89,500.0	N/A	250	N/A	N/A
J. Walter Thompson Australia	Sydney	MJ	8,932.2	9,295.3	-4.0	58,706.3	61,972.1	13,195.7	88,015.5	198	206	-4.0	2
SSC&B:Lintas	Sydney	MJ	8,356.3	7,525.8	11.0	57,414.7	54,492.4	12,345.0	84,820.0	158	121	31.0	5
Mattingly Group	Sydney	MJ	7,404.2	N/A	N/A	46,276.1	N/A	10,938.4	68,364.7	140	N/A	N/A	2
Foote, Cone & Belding	Sydney	MJ	6,077.0	5,620.8	9.0	40,533.3	37,490.4	8,977.6	59,880.7	145	112	29.0	3
Saatchi & Saatchi Compton	Melbourne	MJ	5,335.0	4,721.2	13.0	34,685.1	30,857.6	7,881.5	51,241.1	67	70	-4.0	2
Magnus Nankervis & Curl/DDB	Sydney	MN	4,340.5	N/A	N/A	21,425.8	N/A	6,412.3	31,651.9	72	N/A	N/A	1
Connaghan & May Ayer	Sydney	MN	3,929.9	3,685.7	7.0	22,777.7	21,554.5	5,805.8	33,650.0	64	71	-10.0	2
William Roberts	Sydney	MJ	3,587.6	N/A	N/A	18,953.2	N/A	5,300.0	28,000.0	N/A	N/A	N/A	N/A
Forbes MacFie Hansen	Sydney	NA	3,553.7	3,289.7	8.0	23,691.5	21,931.6	5,250.0	35,000.0	41	41	0.0	1
Dancer Fitzgerald Sample Australia	Sydney	MN	3,431.9	2,944.5	17.0	22,870.0	19,630.1	5,070.0	33,800.0	38	70	-46.0	2
Grey Advertising	Sydney	MJ	3,288.1	3,627.7	-9.0	21,931.7	24,197.0	4,857.6	32,400.2	[illegible]	54	15.0	1
The Campaign Palace	Melbourne	MN	2,538.4	2,233.8	14.0	16,922.5	14,891.8	3,750.0	25,000.0	49	41	20	1
The Ball Partnership	Sydney	MJ	2,317.7	1,842.5	26.0	15,509.8	11,752.3	3,424.0	22,913.0	52	56	-7.0	3
John Singleton	Sydney	NA	2,098.4	N/A	N/A	14,244.0	N/A	3,100.0	21,043.0	N/A	N/A	N/A	N/A
Hertz Walpole	Sydney	MN	1,831.0	2,252.7	-19.0	12,206.0	16,168.0	2,705.0	18,033.0	N/A	N/A	N/A	1
PKB Advertising	Sydney	NE	1,817.2	1,649.2	10.0	11,779.0	10,911.6	2,684.6	17,401.3	32	32	0.0	1
Luscombe & Partners	Melbourne	NA	1,759.9	1,083.0	63.0	10,762.7	6,633.6	2,600.0	15,900.0	28	23	22.0	1
Garland Stewart & Roache	Sydney	MJ	1,736.2	N/A	N/A	11,575.0	N/A	2,565.0	17,100.0	N/A	N/A	N/A	N/A
Tarrant Haysom & Manzie	Melbourne	NA	1,675.3	N/A	N/A	11,168.9	N/A	2,475.0	16,500.0	N/A	N/A	N/A	N/A
Dalziel, Harper & Grey	Melbourne	MN	1,658.0	1,760.1	-6.0	11,059.3	11,740.2	2,449.5	16,338.1	39	40	-3.0	2
Harris Robinson Courtenay	Sydney	MJ	1,624.6	1,514.1	7.0	11,019.9	10,390.4	2,400.0	16,280.0	42	42	0.0	2
Thompson White Partners Australia	Melbourne	NA	1,609.6	1,445.9	11.0	16,575.8	12,229.5	2,377.9	24,487.8	33	30	10.0	1
Scali, McCabe, Sloves	Melbourne	MJ	954.0	1,002.4	-5.0	5,010.6	5,762.8	1,409.3	7,402.3	20	24	-17.0	1
DYR Ltd.	Melbourne	MJ	547.0	419.0	31.0	3,038.5	2,376.2	808.0	4,488.9	8	15	-47.0	1
AUSTRIA												**Exchange rate: 0.0631 schilling**	
GGK Wien	Vienna	MJ	4,101.5	3,666.1	12.0	27,357.0	24,451.3	Sch65,000.0	Sch433,550.0	54	51	6.0	1
Demner & Merlicek	Vienna	NA	4,085.7	2,527.0	62.0	28,369.8	16,855.1	64,750.0	449,600.0	48	39	23.0	1
Werbeagentur Wirz	Vienna	MN	3,597.0	2,776.0	30.0	23,990.0	18,519.0	57,000.0	380,019.0	15	15	0.0	1
McCann-Erickson	Vienna	MJ	3,274.0	3,053.0	7.0	21,838.0	20,364.0	51,880.0	346,040.0	56	48	17.0	N/A
SSC&B:Lintas Wien	Vienna	MJ	2,866.0	2,838.0	1.0	24,230.0	22,315.0	45,420.0	383,990.0	40	39	3.0	1
Ogilvy & Mather	Vienna	MJ	2,647.6	2,045.1	29.0	17,659.7	13,640.6	41,959.0	279,868.0	46	37	24.0	3
Young & Rubicam	Vienna	MJ	2,348.0	2,019.0	16.0	15,661.0	13,465.0	37,216.0	248,195.5	37	38	-3.0	1
Die Sieber	Vienna	NE	2,322.1	1,937.2	20.0	14,829.0	12,920.9	36,800.0	235,000.0	26	24	8.0	1
MMS Werbeagentur	Linz	NA	2,271.6	1,956.1	16.0	15,648.8	14,449.9	36,000.0	248,000.0	26	26	0.0	1
Team/BBDO Austria	Vienna	MJ	2,100.0	1,874.1	12.0	13,970.0	12,500.1	33,200.0	221,400.0	21	23	-9.0	1
Dorland Werbeagentur	Vienna	NA	2,080.0	N/A	N/A	13,200.0	N/A	32,961.8	209,180.4	12	12	0.0	1
Dr. Puttner & Ted Bates	Vienna	MJ	1,779.4	1,766.8	1.0	12,014.2	11,800.0	28,200.0	190,400.0	24	27	-11.0	1
Grey Austria	Vienna	MJ	1,482.9	1,161.0	28.0	9,890.6	9,275.7	23,500.0	156,745.0	27	29	-7.0	1
Gould Cargill & Cie.	Vienna	MJ	1,388.2	1,325.1	5.0	9,275.7	8,897.1	22,000.0	147,000.0	21	20	5.0	1
J. Walter Thompson	Vienna	MJ	1,382.4	1,657.5	-17.0	9,215.9	11,050.1	21,908.0	146,053.0	25	26	-3.0	1
DMB&B	Vienna	MJ	1,254.0	1,226.0	2.0	8,362.0	8,178.0	19,874.0	132,514.0	18	19	-5.0	1

Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
				($000)			($000)	($000; national currency)					
RSCG-Jasch & Schramm	Vienna	MJ	1,192.6	767.0	55.0	8,330.0	5,363.0	18,900.0	132,000.0	18	13	38.0	1
DDB Needham	Vienna	MJ	1,186.0	1,249.0	-5.0	7,951.0	8,330.0	18,800.0	126,000.0	21	22	-5.0	1
Weinberger Werbehaus	Vienna	NA	1,100.0	N/A	N/A	5,190.0	N/A	14,900.0	74,000.0	14	N/A	N/A	1
GGK Salzburg	Salzburg	MJ	1,041.0	N/A	N/A	6,941.0	N/A	16,500.0	110,000.0	16	N/A	N/A	1
Publicis Wien	Vienna	MJ	991.0	917.0	8.0	9,831.0	9,560.0	15,700.0	155,800.0	19	21	-10.0	1
Marketing Studio/FCB	Viennna	MN	896.0	776.1	15.0	5,976.5	5,176.8	14,200.0	94,714.0	17	17	0.0	1
Campbell Ewald	Vienna	MJ	67.0	21.5	240.0	445.0	143.5	1,058.0	7,050.0	N/A	N/A	N/A	1
Target Werbung	Vienna	MJ	24.4	52.8	-54.0	162.4	352.1	386.0	2,573.0	0	1	-10.0	1
BAHRAIN													**Exchange rate: 2.89 dinar**
Fortune Promoseven Network	Bahrain	NA	12,555.0	12,702.5	-1.0	38,036.8	38,886.8	BD4,344.3	BD13,161.5	140	140	0.0	7
Madco Bahrain	Bahrain	NA	660.0	682.0	-3.0	3,000.0	3,100.0	228.4	1,038.0	N/A	N/A	N/A	N/A
BARBADOS													**Exchange rate: 0.5371 B dollar**
Corbin Compton	Bridgetown	MJ	480.8	492.4	-2.0	3,214.5	2,940.9	B$895.2	B$5,984.9	18	18	0.0	1
Smith & Oxley Advertising	St. Michael	NA	455.8	422.9	8.0	2,015.4	1,867.7	911.6	4,030.9	22	22	0.0	1
BELGIUM													**Exchange rate: 0.0215 B franc**
HHD Ogilvy & Mather	Brussels	MJ	7,693.2	6,719.8	14.0	N/A	N/A	BF357,822.6	BF N/A	117	119	-2.0	1
McCann-Erickson	Brussels	MJ	7,652.0	7,698.0	-1.0	51,039.0	51,346.0	355,919.0	2.37 bill.	140	130	8.0	N/A
DMB&B	Brussels	MJ	5,821.2	7,369.1	-21.0	38,711.2	49,152.1	270,755.0	1.80 bill.	118	110	7.0	1
Lintas Brussels	Brussels	MJ	5,289.1	4,627.5	14.0	35,278.3	30,865.2	246,005.0	1.64 bill.	74	71	4.0	1
Lowe Marschalk Troost	Brussels	MJ	4,464.0	3,454.0	29.0	29,778.0	23,038.0	207,646.0	1.39 bill.	64	63	2.0	1
HCM Dechy	Brussels	MJ	4,284.5	4,087.3	5.0	28,577.8	27,262.0	199,280.0	1.33 bill.	78	77	1.0	1
Young & Rubicam Belgium	Brussels	MJ	4,250.0	4,263.0	0.0	28,348.0	28,432.0	197,668.0	1.32 bill.	68	68	0.0	N/A
J. Walter Thompson	Brussels	MJ	3,471.8	3,851.1	-10.0	23,156.6	25,686.6	161,477.0	1.08 bill.	63	54	17.0	1
VVL/BBDO	Brussels	MJ	3,355.9	2,711.2	24.0	22,383.9	18,083.9	156,088.0	1.04 bill.	58	51	14.0	3
Impact FCB	Brussels	MJ	3,286.4	3,188.5	3.0	21,920.0	21,267.2	152,854.0	1.02 bill.	58	62	-6.0	1
DDB Needham	Brussels	MJ	3,214.0	2,966.9	8.0	21,437.5	19,789.0	149,489.0	997,091.0	54	51	6.0	1
Publicis	Brussels	MJ	2,917.0	2,838.0	3.0	19,455.0	18,920.0	135,667.0	904,899.0	53	53	0.0	1
Grey	Brussels	MJ	2,836.4	2,795.0	1.0	18,920.0	18,640.0	131,925.0	880,000.0	46	48	-4.0	1
HCM Bruxelles	Brussels	MJ	2,537.0	2,193.0	16.0	16,920.5	15,157.5	118,000.0	787,000.0	38	40	-5.0	1
Ted Bates	Brussels	MJ	2,414.0	2,160.0	12.0	16,105.0	14,132.0	112,308.0	749,094.0	42	42	0.0	1
Leo Burnett-Belgium	Brussels	MJ	2,355.0	2,121.0	11.0	15,702.0	14,143.0	109,542.0	730,317.0	39	37	5.0	1
M&CW	Brussels	MN	2,344.0	1,200.0	95.0	9,336.0	8,000.0	109,024.1	435,641.4	26	32	-19.0	1
Partner	Brussels	NE	2,341.2	2,154.5	9.0	15,616.1	14,370.2	108,895.0	726,329.7	42	42	0.0	3
Garbarski RSCG	Brussels	MJ	2,300.5	2,000.0	15.0	15,050.0	13,330.0	107,000.0	700,000.0	34	30	13.0	1
LVH-Alliance	Brussels	MJ	2,187.3	2,034.0	8.0	14,581.8	13,560.2	101,733.7	678,224.9	48	39	23.0	1
TBWA	Brussels	MJ	1,936.0	1,503.9	29.0	12,696.0	10,439.9	90,061.0	590,516.0	28	22	27.0	1
Three Points	Brussels	NA	880.0	850.0	4.0	5,840.0	5,520.0	40,930.6	271,630.0	79	78	6.0	2
Moors/Bronselaer	Brussels	NE	812.6	720.8	13.0	5,420.3	4,805.1	37,797.0	252,109.0	12	11	9.0	1
GelderInterpartners	Brussels	NA	600.0	541.0	11.0	4,000.0	3,600.0	27,886.1	186,000.0	14	13	8.0	2
Columbia Advertising	Brussels	NA	553.3	N/A	N/A	3,665.0	N/A	25,736.8	170,000.0	14	N/A	N/A	1
Moussault Ayer	Antwerp	MJ	507.7	626.8	-19.0	3,382.3	4,242.6	23,593.8	157,314.4	15	14	7.0	1
BERMUDA													**Exchange rate: 1.00 B dollar**
Advertising Associates/Compton	Hamilton	NE	527.3	445.3	18.0	3,777.4	3,327.1	527.3	3,777.4	22	22	0.0	1
BRAZIL													**Exchange rate: 0.072686 cruzado**
MPM Propaganda	Sao Paulo	NE	25,695.2	36,688.5	N/A	102, 780.6	146,754.2	Cz353,509.0	Cz1.41 bill.	953	933	2.0	14
Alcantara Machado, Periscinoto Comunicacoes	Sao Paulo	NA	17,618.3	31,142.2	N/A	70,473.1	124,568.7	242,389.0	969,556.0	421	442	-5.0	3
Salles/ Inter-Americana	Sao Paulo	NE	15,264.1	25,288.0	N/A	61,056.2	101,152.0	210,000.0	840,000.0	508	500	2.0	3
DPZ-Duailibi Petit Zaragoza	Sao Paulo	NA	14,827.9	19,851.6	N/A	59,311.8	79,352.0	204,000.0	816,000.0	350	375	-7.0	3
Standard, Ogilvy & Mather	Sao Paulo	MJ	12,009.4	46,527.0	N/A	46,225.5	59,553.5	165,223.3	635,960.9	389	402	-3.0	3
McCann-Erickson	Sao Paulo	MJ	10,976.0	14,268.1	N/A	73,210.0	95,168.6	151,005.0	1.01 bill.	354	366	-3.0	N/A
Denison Propaganda	Sao Paulo	NE	10,684.8	16,568.0	N/A	N/A	N/A	147,000.0	N/A	252	285	-12.0	N/A
J. Walter Thompson Publicidade	Sao Paulo	MJ	9,641.0	18,541.8	N/A	64,305.5	41,235.7	132,639.0	884,702.1	362	393	-8.0	2
Norton Publicidade	Sao Paulo	NE	9,085.8	11,990.0	N/A	38,343.0	47,960.0	125,000.0	500,000.0	300	366	-18.0	4
Fisher, Justus Young & Rubicam Brazil	Sao Paulo	MJ	7,819.0	9,199.6	N/A	52,153.0	61,363.0	107,600.0	717,521.0	333	275	21.0	N/A
CBBA/Propeg	Sao Paulo	MJ	7,341.3	10,904.4	N/A	28,347.0	45,780.0	101,000.0	390,000.0	331	375	-12.0	5
SGB Publicidade e Promocoes	Rio de Janeiro	NE	5,451.5	6,932.0	N/A	27,257.3	46,213.0	75,000.0	375,000.0	190	180	6.0	2
LS/BBDO	Sao Paulo	MN	5,170.0	15,493.9	N/A	20,666.0	62,029.5	71,128.0	284,319.0	100	94	6.0	2
SSC&B: Lintas Brazil	Sao Paulo	MJ	4,430.2	6,038.6	N/A	18,563.3	27,681.6	60,950.0	255,390.0	160	160	0.0	1
Adag Servicos de Publicidade	Sao Paulo	NA	3,779.7	1,380.4	N/A	18,898.4	6,901.9	52,000.7	260,004.2	62	52	19	3
Expressao	Sao Paulo	NA	3,125.5	N/A	N/A	12,502.0	N/A	43,000.0	172,000.0	120	N/A	N/A	3
Leo Burnett Publicidade	Sao Paulo	MJ	2,989.0	3,593.3	N/A	19,934.0	23,956.9	41,117.0	274,250.0	79	81	-2.0	1
W/GGK Sao Paulo	Sao Paulo	MJ	1,723.0	1,624.0	N/A	11,484.3	10,833.0	23,700.0	158,000.0	56	44	27.0	1
GTM&C	Sao Paulo	NA	1,652.2	1,690.2	N/A	6,608.6	9,836.9	22,730.0	90,920.0	51	70	-27.0	2
Esquire Publicidade	Rio de Janeiro	NE	1,514.0	1,082.0	N/A	7,530.0	4,720.0	20,796.0	103,462.0	58	46	26.0	2
FCB/Siboney	Sao Paulo	MJ	1,463.8	1,615.4	N/A	9,763.4	10,773.5	20,138.3	134,322.5	61	53	15.0	1
Scali, McCabe, Sloves Propaganda	Sao Paulo	MJ	1,163.0	1,994.5	N/A	4,984.0	7,403.3	16,108.7	69,031.6	91	113	-19.0	2
Ogilvy & Mather Direct	Sao Paulo	MJ	495.8	559.3	N/A	1,268.6	1,742.2	6,821.5	17,453.0	15	31	-52.0	2
PPR-Profissionais de Propaganda Reunidos	Sao Paulo	MJ	291.3	41.9	N/A	1,943.1	946.8	4,008.0	26,733.4	20	7	186.0	1

With Brazilian agencies, AA altered its procedure of determining an agency's "real growth" (applying 1986 exchange rates to 1985 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1985 are based on the average annual exchange rate (.000218) for that year.

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986 ($000; national currency)	Employes 1986	Employes 1985	Employes Percent change	Number offices
BRITAIN													**Exchange rate: 1.4678 pounds**
Saatchi & Saatchi UK	London	MJ	92,471.4	86,717.6	7.0	616,476.0	568,331.6	£63,000.0	£420,000.0	2,000	1,800	11.0	N/A
J. Walter Thompson Co.	London	MJ	41,832.3	37,365.8	12.0	278,883.0	249,113.0	28,500.0	190,001.0	646	695	-7.0	2
DFS Dorland	London	MJ	41,830.0	30,823.8	36.0	279,000.0	205,492.0	28,500.0	190,000.0	589	500	18.0	1
McCann-Erickson U.K.	London	MJ	38,963.0	25,190.0	60.0	259,883.0	168,017.0	26,546.0	177,061.0	848	403	110.0	N/A
Young & Rubicam Holdings	London	MJ	37,594.8	28,597.7	31.0	251,132.0	191,032.0	25,613.0	171,096.2	660	551	20.0	N/A
Charles Barker Group	London	MN	33,988.4	30,307.1	12.0	224,786.0	200,554.0	23,156.0	153,145.0	739	675	19.0	9
Boase Massimi Pollitt	London	NA	30,823.8	22,017.0	40.0	206,959.8	125,203.4	21,000.0	141,000.0	400	240	67.0	1
Ogilvy & Mather	London	MJ	26,029.5	25,520.9	2.0	167,760.7	164,002.1	17,733.7	114,294.0	362	364	-1.0	1
Grey Ltd.	London	MJ	24,866.7	18,388.2	35.0	165,861.4	122,708.1	16,941.5	113,000.0	293	226	30.0	1
DMB&B	London	MJ	23,117.9	24,218.7	-5.0	154,119.0	161,458.0	15,750.0	105,000.0	349	398	-12.0	1
Lowe Howard-Spink Marschalk	London	MJ	21,070 3	14,645.7	44 0	149,716.0	97,686.5	14,355.0	102,000.0	201	185	9.0	1
WCRS & Partners	London	MJ	19,815.3	13,870.6	43.0	132,102.0	92,470.9	13,500.0	90,000.0	190	165	15.0	1
Collett Dickenson Pearce Intl.	London	NA	19,010.0	16,940.0	12.0	128,430.0	114,490.0	12,950.0	87,500.0	253	249	2.0	1
Foote, Cone & Belding	London	MJ	16,248.0	15,227.8	7.0	108,374.2	101,569.6	11,069.6	73,834.4	277	252	10.0	2
Lintas	London	MJ	15,202.0	12,771.0	19.0	117,600.1	96,563.6	10,357.0	80,120.0	209	211	-1.0	4
Leo Burnett Ltd.	London	MJ	15,036.0	13,163.0	14.0	100,251.0	87,760.0	10,244.0	68,300.0	194	200	-3.0	1
KHBB	London	MJ	13,320.3	17,613.6	-24.0	88,801.5	117,424.0	9,075.0	60,500.0	180	221	-19.0	1
Abbott Mead Vickers/SMS	London	NA	12,926.9	10,088.2	28.0	86,366.8	73,392.9	8,807.0	58,841.0	129	108	19.0	1
McCormick-Publicis	London	MJ	12,880.0	10,040.0	28.0	85,866.0	66,932.0	8,775.0	58,500.0	175	172	2.0	2
Allen Brady & Marsh	London	MJ	12,492.0	11,169.2	12.0	83,283.0	74,461.5	8,511.0	56,740.0	107	192	-79.0	N/A
Geers Gross Advertising	London	MJ	12,000.0	14,100.0	-15.0	70,000.0	87,000.0	8,175.5	47,690.3	91	100	-9.0	1
Ted Bates	London	MJ	10,563.8	16,779.9	-37.0	63,546.9	94,673.1	7,197.0	43,294.0	202	226	-11.0	1
Gold Greenlees Trott Advertising	London	NA	10,421.0	6,898.0	51.0	73,977.0	43,300.0	7,100.0	50,400.0	120	102	18.0	1
Davidson Pearce	London	NA	9,878.5	8,980.7	10.0	82,572.8	73,082.8	6,730.2	56,266.2	210	210	0.0	1
Yellowhammer Advertising	London	NA	8,388.5	5,416.2	55.0	55,923.2	36,107.9	5,715.0	38,100.0	N/A	89	N/A	1
Bartle Bogle Hegarty	London	NA	8,366.5	5,137.3	63.0	56,657.0	34,493.0	5,700.0	38,600.0	97	55	76.0	1
Cogent Elliott	London	NA	7,926.1	6,605.1	20.0	52,840.8	44,034.0	5,400.0	36,000.0	N/A	130	N/A	N/A
Doyle Dane Bernbach	London	MJ	7,900.0	8,700.0	-9.0	60,900.0	66,100.0	5,400.0	41,500.0	148	173	-14.0	1
Chetwynd Haddons	London	NA	7,146.7	5,830.2	23.0	47,644.8	37,135.3	4,869.0	32,460.0	N/A	N/A	N/A	N/A
Reeves Robertshaw Needham	London	MJ	7,141.0	5,082.0	41.0	64,916 0	46,196.0	4,865.0	44,227.0	108	85	27.0	1
Dewe Rogerson	London	NA	7,034.5	4,048.0	74.0	62,939.3	45,564.9	4,792.6	42,880.0	123	115	7.0	1
Colman RSCG	London	MJ	6,900.0	6,810.0	1.0	53,427.0	48,730.0	4,700.0	36,400.0	74	68	9.0	1
Lonsdale Advertising	London	NA	6,869.3	5,988.6	15.0	45,800.0	39,600.0	4,680.0	31,200.0	111	132	-16.0	1
TBWA	London	MJ	6,682.0	7,349.6	-9.0	44,548.0	48,999.6	4,552.0	30,350.0	57	67	-15.0	1
HCM Horner Collis & Kirvan	London	MJ	6,664.0	5,617.0	19.0	60,033.0	40,814.0	4,540.0	40,900.0	85	76	12.0	1
BBDO	London	MJ	6,164.8	5,577.6	11.0	69,720.5	66,491.3	4,200.0	47,200.0	90	89	1.0	1
Ogilvy & Mather Direct	London	MJ	6,107.0	3,497.0	75.0	38,000.0	22,000.0	4,161.3	26,000.0	139	127	9.0	1
ASL Lane Alliance	London	MJ	5,063.9	N/A	N/A	33,760.0	N/A	3,450.0	23,000.0	N/A	N/A	N/A	2
ARC Advertising	London	MJ	5,061.4	3,111.7	63.0	33,759.4	20,755.3	3,448.3	23,000.0	45	60	-25.0	1
GGK London	London	MJ	4,410.0	2,348.5	88.0	29,400.0	15,558.7	3,000.0	20,000.0	40	50	-20.0	1
Valin Pollen	London	NA	4,205.2	6,495.0	-35.0	28,035.0	43,300.1	2,865.0	19,100.0	N/A	145	N/A	1
Moxon, Dolphin & Kerby	London	MJ	4,040.9	7,707.4	-48.0	14,026.3	32,144.8	2,753.0	9,556.0	74	62	19.0	1
White Bull Holmes Group	London	MJ	4,040.0	3,040.0	33.0	26,930.0	20,260.0	2,750.0	18,350.0	83	65	28.0	2
LansdownEuro	London	MJ	3,850.0	3,357.0	15.0	25,669.0	22,385.0	2,623.0	17,488.0	60	57	5.0	1
Slaymaker Cowley White/BDG	London	MN	3,400.0	3,126.5	9.0	18,000.0	19,493.2	2,316.4	12,263.2	54	65	-17.0	1
Delaney Fletcher Delaney	London	NA	3,159.4	2,752.1	15.0	21,100.0	15,000.0	2,152.5	14,350.0	21	14	50.0	1
Garratt Baulcombe	Nottingham	MJ	3,031.0	3,065.8	-1.0	20,216.9	20,449.1	2,065.0	13,773.6	99	101	-2.0	2
F. John French Agency	London	NA	2,935.6	2,568.7	14.0	11,742.4	10,274.6	2,000.0	8,000.0	34	38	-11.0	1
St. James's Corporate Communications	London	MJ	2,690.0	2,420.0	11.0	17,910.0	16,150.0	1,830.0	12,200.0	61	71	-14.0	1
Leagas Delaney Partnership	London	MJ	2,642.0	3,301.1	-20.0	17,613.6	22,017.0	1,800.0	12,000.0	N/A	56	N/A	1
Ogilvy & Mather Partners	London	MJ	2,214.0	2,306.9	-4.0	14,444.3	15,052.5	1,508.5	9,840.8	27	25	8.0	1
Ogilvy & Mather Scotland	Glasgow	MJ	1,942.7	1,556.1	25.0	12,240.7	9,786.8	1,323.5	8,339.5	42	43	-1.0	3
Primary Contact	London	MJ	1,891.3	2,547.8	-26.0	11,592.4	15,475.9	1,288.5	7,897.8	56	60	-7.0	1
Butler, Borg & LSW	London	MN	1,536.7	982.2	56.0	10,701.4	5,966.9	1,046.9	7,290.8	42	30	40.0	1
Mallett-McCormick	London	NE	1,300.0	N/A	N/A	10,000.0	N/A	900.0	6,300.0	33	N/A	N/A	1
Ogilvy & Mather Focus	London	MJ	1,252.2	1,102.4	14.0	7,945.7	6,905.1	853.1	5,413.3	25	26	-4.0	1
Reid Walker	London	NA	1,188.9	1,027.5	16.0	8,500.0	7,400.0	810.0	5,800.0	30	26	15.0	N/A
FCB Cosby Paul	London	MJ	487.8	N/A	N/A	3,253.5	N/A	332.3	2,216.6	9	N/A	N/A	2
CAMEROON													**Exchange rate: 0.002806 CFA**
SSC&B: Lintas Worldwide	Douala		39.44	N/A	N/A	263.1	N/A	CFA14,058.0	CFA93,767.0	8	N/A	N/A	1
CANADA													**Exchange rate: 0.7210 C dollar**
Foster Advertising	Toronto	NA	19,452.3	18,420.0	6.0	129,746.9	122,861.5	C$26,979.6	C$179,954.1	492	511	-4.0	9
Ogilvy & Mather	Toronto	MJ	18,377.0	16,702.0	10.0	125,512.0	111,394.5	25,488.0	169,920.0	319	327	-2.0	12
J. Walter Thompson	Toronto	MJ	16,635.0	18,409.3	-10.0	110,897.0	122,729.0	23,072.0	153,810.0	385	420	-8.0	4
Young & Rubicam	Toronto	MJ	14,830.2	13,486.3	10.0	98,783.0	89,838.0	20,569.0	137,008.1	260	265	-2.0	N/A
Vickers & Benson	Toronto	NA	13,122.2	12,617.5	4.0	85,079.0	76,426.0	18,200.0	118,000.0	320	315	2.0	3
Baker Lovick	Toronto	MN	12,412.9	11,535.6	8.0	82,752.8	76,942.5	17,139.8	114,265.0	241	235	3.0	6
Cossette Communication-Marketing	Toronto	NA	11,308.9	9,787.6	16.0	75,392.8	65,250.5	15,685.0	104,567.0	252	245	3.0	4
Grey Advertising	Toronto	MJ	9,973.9	7,954.6	25.0	66,525.7	53,057.7	13,833.4	92,268.6	179	151	19.0	2
McCann-Erickson Canada	Toronto	MJ	9,667.0	10,084.0	-4.0	64,479.0	67,260.0	13,408.0	89,431.0	184	198	-7.0	N/A
Ronalds-Reynolds	Toronto	NE	8,845.2	8,940.4	-1.0	68,073.0	56,670.6	12,268.0	95,415.0	193	219	-12.0	3
Saatchi & Saatchi-Compton Hayhurst	Toronto	MJ	8,760.2	8,111.3	8.0	74,601.0	64,890.0	12,150.0	103,468.8	135	149	-9.0	1
Ted Bates Advertising	Toronto	MJ	8,686.0	7,628.0	14.0	59,245.0	50,888.0	12,047.0	82,170.0	158	156	1.0	2
Leo Burnett Co.	Toronto	MJ	8,445.0	7,935.0	6.0	56,303.0	52,905.0	11,713.0	78,091.0	174	158	10.0	2
BCP Strategy Creativity	Montreal	NA	8,352.1	5,362.8	56.0	55,890.7	35,751.3	11,584.4	77,520.4	136	140	-3.0	1

Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
				($000)			($000)	($000; national currency)					
DMB&B	Toronto	MJ	5,977.0	4,836.0	24.0	40,768.0	33,564.0	8,290.0	56,543.0	114	105	9.0	1
Marketel/Publim	Montreal	NA	5,950.0	4,326.0	38.0	39,655.0	28,840.0	8,252.4	55,000.0	88	61	44.0	2
Scali, McCabe, Sloves—Canada	Toronto	MJ	5,119.6	4,649.4	10.0	30,021.6	30,270.2	7,100.2	41,638.8	102	106	-4.0	2
Foote, Cone & Belding	Toronto	MJ	4,657.1	5,090.0	-9.0	31,062.6	33,950.3	6,459.2	43,082.7	84	92	-9.0	1
Grant Tandy	Toronto	MJ	4,052.0	4,232.6	-4.0	27,013.0	28,217.7	5,620.0	37,466.0	71	75	-5.0	3
Miller Myers Bruce DallaCosta	Toronto	NA	3,589.0	2,415.0	49.0	23,927.0	18,205.0	4,978.0	33,186.0	51	27	89.0	1
R.T. Kelley	Hamilton	NA	3,306.5	3,030.4	9.0	22,866.5	20,108.2	4,586.0	31,715.0	75	74	1.0	2
DDB Needham Worldwide	Toronto	MJ	3,039.0	N/A	N/A	20,260.1	N/A	4,215.0	28,100.0	62	N/A	N/A	1
SSC&B:Lintas	Toronto	MJ	2,981.9	2,067.5	44.0	19,889.4	13,791.2	4,135.8	27,585.8	57	48	19.0	1
Kert Advertising	Toronto	NA	2,826.0	2,570.0	10.0	19,341.0	17,721.0	3,919.0	26,825.0	51	46	11.0	4
Prism Communications	Montreal	NA	2,800.0	2,200.0	27.0	16,220.0	14,059.0	3,900.0	22,500.0	35	26	35.0	2
PNMD	Montreal	MN	2,703.8	2,596.0	42.0	18,000.0	17,000.0	3,750.0	25,000.0	43	40	8.0	1
Ambrose Carr De Forest & Linton	Toronto	NA	2,617.4	2,283.8	15.0	17,592.4	17,123.8	3,630.2	24,400.0	40	40	0.0	1
Ian Roberts	Toronto	NA	2,522.3	2,406.2	5.0	16,874.8	16,098.4	3,498.4	23,404.7	56	54	4.0	3
Enterprise Advertising Associates	Toronto	MJ	2,007.0	1,942.0	6.0	13,389.0	12,947.0	2,784.2	18,571.0	32	35	-9.0	2
Francis, Williams & Johnson	Calgary	NA	1,875.0	1,426.0	31.0	12,500.0	9,520.0	2,600.0	17,342.0	73	70	4.0	2
Lowe Marschalk Goodgoll	Toronto	MJ	1,586.0	1,181.0	34.0	10,455.0	7,876.9	2,200.0	14,500.0	23	23	0.0	1
Bozell, Jacobs, Kenyon & Eckhardt	Toronto	MJ	1,320.0	1,225.7	8.0	8,770.0	8,147.3	1,820.0	12,100.0	30	28	7.0	2
Base Brown & Partners	Toronto	NA	1,171.6	991.4	18.0	9,373.0	7,931.0	1,625.0	13,000.0	20	18	11.0	1
Paul, Phelan & Perry	Toronto	NA	879.6	684.2	29.0	6,921.6	5,768.0	1,220.0	9,600.0	25	21	19.0	2
Germain Advertising	Toronto	NA	605.6	421.8	44.0	4,037.6	2,811.9	840.0	5,600.0	12	12	0.0	6
Cooper Hayes Advertising	Calgary	NA	490.3	270.0	82.0	6,164.6	4,680.0	680.0	8,550.0	12	6	100.0	1
Stringham & Grant Tandy	Winnipeg	MN	452.1	280.5	61.0	2,743.7	1,976.8	627.0	3,805.4	11	10	10.0	1
Bleau, Duperrey, Giguere & Associes	Quebec	NA	180.3	175.3	3.0	1,126.8	1,095.7	250.0	1,562.8	7	7	0.0	1
CHILE												**Exchange rate: 0.0054 peso**	
J. Walter Thompson Chilena	Santiago	MJ	2,656.1	1,883.1	41.0	17,716.1	12,554.3	Ps491,868.5	Ps3.28 bill.	145	130	12.0	1
McCann-Erickson (Chile)	Santiago	MJ	1,541.0	1,152.0	34.0	10,278.0	7,684.0	285,346.0	1.90 bill.	75	65	15.0	1
Publiart/BBDO	Santiago	MN	1,412.0	1,268.1	11.0	9,421.9	8,458.3	261,483.0	1.74 bill.	73	65	12.0	1
Azocar, Morrison, Walker	Santiago	MN	1,109.9	810.4	37.0	7,399.4	5,405.6	205,541.4	1.37 bill.	45	40	13.0	1
SSC&B: Lintas Worldwide	Santiago	MJ	956.9	734.5	30.0	6,382.8	4,899.3	177,196.9	1.18 bill.	66	66	0.0	1
Unitros Chile	Santiago	NA	814.2	446.5	82.0	5,430.6	2,978.5	150,775.1	1.01 bill.	44	34	29.0	1
Northcote, Ogilvy & Mather	Santiago	MN	648.0	510.3	27.0	4,320.0	3,402.0	120,000.0	799,999.0	N/A	43	N/A	1
Grey Chile	Santiago	MN	634.4	510.3	24.0	4,231.6	3,403.8	117,486.9	783,637.4	42	43	-2.0	1
Young & Rubicam de Chile	Santiago	MJ	572.0	402.0	42.0	3,815.0	2,680.0	105,929.0	706,499.9	42	37	14.0	N/A
Leo Burnett Co. Chile	Santiago	MJ	520.0	329.0	58.0	3,467.0	2,195.0	96,303.0	642,052.0	40	34	18.0	1
Israel & de Bianchi	Santiago	NE	501.4	342.6	46.0	3,342.6	2,284.3	92,850.0	619,000.0	38	34	12.0	1
Matte & Mendez-Compton	Santiago	MJ	438.7	N/A	N/A	2,925.9	N/A	81,240.7	541,833.3	25	21	19.0	1
Hermosilla, Zegers	Santiago	MN	365.6	313.8	17.0	2,431.1	2,086.7	67,700.0	450,205.0	30	28	7.0	1
CHINA												**Exchange rate: 0.27692 renmibi**	
DYR Advertising	Beijing	MJ	45.0	N/A	N/A	167.0	N/A	162.5	603.0	7	N/A	N/A	1
COLOMBIA												**Exchange rate: 0.0054 peso**	
Leo Burnett Colombia	Bogota	MJ	2,055.0	1,625.0	26.0	13,703.0	10,832.0	Ps380,614.0	Ps2.54 bill.	117	119	-2.0	1
Atlas Publicidad	Bogota	NE	1,951.4	1,447.4	35.0	13,009.2	9,649.1	361,366.0	2.41 bill.	135	134	1.0	1
Atenas/BBDO	Bogota	NE	1,822.2	1,466.3	24.0	11,644.3	7,439.0	337,441.3	2.16 bill.	90	85	6.0	1
Publicidad Puma/Compton	Bogota	MJ	1,808.7	1,201.0	51.0	7,830.0	5,021.3	334,944.4	1.45 bill.	70	67	4.0	2
McCann Erickson Colombia	Bogota	MJ	1,552.0	1,334.0	16.0	10,352.0	8,898.0	287,373.0	1.92 bill.	78	82	-5.0	N/A
Centrum Ogilvy & Mather	Bogota/Cali	MN	1,124.3	853.2	32.0	5,421.6	4,374.0	208,200.0	1.00 bill.	78	72	8.0	2
Contacto Publicidad	Bogota	NE	912.6	599.4	52.0	6,085.8	3,996.0	169,000.0	1.27 bill.	78	62	26.0	2
G. Meza & Ted Bates	Bogota	NE	822.1	693.6	19.0	5,483.1	4,626.5	152,232.0	1.02 bill.	67	61	10.0	1
Publicidad Arte Filme	Cali	MJ	399.1	362.5	10.0	2,661.9	2,417.9	73,905.0	492,946.0	29	20	45.0	1
COSTA RICA												**Exchange rate: 0.0203 colon**	
Alberto H. Garnier-BBDO	San Jose	NE	1,494.9	1,218.8	23.0	7,053.5	5,519.7	C73,639.2	C347,462.7	100	99	1.0	1
McCann-Erickson Centroamericana	San Jose	MJ	1,189.0	1,054.0	12.0	7,931.0	7,030.0	58,593.0	390,815.0	43	41	5.0	N/A
FCB/Siboney	San Jose	MJ	484.9	321.0	51.0	3,234.2	2,140.9	23,886.4	159,322.6	27	25	8.0	1
APCU de Costa Rica	San Jose	MJ	347.3	248.7	40.0	2,313.3	1,657.9	17,110.5	113,956.0	27	17	59.0	1
CURACAO												**Exchange rate: 0.5871 florin**	
R.J. Dovale Advertising	Willemstad	NA	303.5	311.6	3.0	1,063.5	1,177.8	FL517.0	FL1,969.4	15	15	0.0	1
CYPRUS												**Exchange rate: 2.12 C pound**	
Impact/BBDO International	Nicosia	MN	3,600.0	3,900.0	-8.0	26,000.0	29,800.0	CY£1,698.1	CY£12,264.2	111	108	3.0	6
Camp, Saadeh & Skaff	Nicosia	NA	320.0	N/A	N/A	2,000.0	N/A	150.9	943.5	12	N/A	N/A	1
DENMARK												**Exchange rate: 0.1198 kroner**	
Ted Bates A/S	Copenhagen	MJ	9,936.7	9,393.4	6.0	68,674.2	63,082.6	DKr82,944.0	DKr573,024.0	183	177	3.0	3
Henriksen & Sieling/BBDO	Copenhagen	MN	6,195.6	5,197.0	19.0	41,324.0	35,811.0	51,716.0	344,945.0	75	66	14.0	4
scan-ad reklamebureau	Aarhus	NA	6,091.8	4,672.2	30.0	40,637.5	31,163.6	50,850.0	339,169.5	125	119	5.0	9
Young & Rubicam Copenhagen	Copenhagen	MJ	4,918.0	4,008.0	23.0	32,803.0	26,735.0	41,065.0	273,806.6	85	73	16.0	N/A

Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
				($000)			($000)	($000; national currency)					
Lintas	Copenhagen	MJ	4,416.0	3,556.0	24.0	31,352.3	25,363.7	36,861.4	261,705.0	66	59	12.0	2
Ogilvy & Mather	Copenhagen	MJ	3,878.0	3,484.0	11.0	22,150.0	21,597.0	32,366.0	184,893.0	73	70	4.0	4
Gutenberghus Reklamebureau	Copenhagen	NA	3,601.0	2,954.0	22.0	24,897.0	21,054.0	30,060.0	207,820.0	63	63	0.0	N/A
Lyre & Valbo Reklamebureau	Copenhagen	NA	2,940.0	2,256.0	30.0	19,615.0	15,372.0	24,526.0	163,588.0	45	40	13.0	2
NP/3 Ltd.	Aarhus	NA	2,496.0	1,847.1	35.0	28,811.9	19,951.0	20,835.0	240,500.0	46	38	21.0	3
N/P Grey	Egaa/Aarhus	MN	2,032.0	1,668.7	22.0	14,666.0	13,113.3	16,962.0	122,421.0	38	32	19.0	2
Leo Burnett Denmark	Copenhagen	MJ	1,829.0	1,607.0	14.0	12,191.0	10,711.0	15,264.0	101,765.0	33	31	6.0	1
McCann-Erickson A/S	Copenhagen	MJ	1,639.0	1,305.0	26.0	10,932.0	8,704.0	13,683.0	91,266.0	29	25	16.0	N/A
DMB&B	Copenhagen	MJ	1,519.0	1,669.0	-9.0	12,456.0	13,727.0	12,680.0	103,970.0	34	38	-11.0	1
Innovation	Copenhagen	MN	1,383.8	1,205.4	15.0	9,536.0	8,272.2	11,551.0	79,600.0	32	28	14.0	1
Lockey FCB A/S	Copenhagen	MN	1,289.7	1,300.3	-1.0	8,602.4	8,672.9	10,765.6	71,806.6	22	29	-24.0	1
Bergenholz & Arnesen	Copenhagen	NE	1,122.6	1,307.5	-14.0	14,533.3	11,872.9	9,370.7	121,480.0	26	28	-7.0	1
Grey-Denmark	Copenhagen	MJ	1,111.8	1,375.0	-19.0	8,631.7	10,331.9	9,281.0	72,051.0	22	23	-4.0	1
DMM Ipsen & Parmo	Copenhagen	MJ	1,099.0	912.0	21.0	8,248.0	7,093.0	9,172.0	68,850.0	17	15	13.0	1
J. Walter Thompson	Copenhagen	MJ	974.4	1,049.4	-7.0	6,499.3	6,996.5	8,133.6	54,250.9	23	20	15.0	1
Berg & Lyhne Reklamebureau	Copenhagen	NA	694.8	460.2	51.0	4,632.1	3,068.1	5,799.8	38,665.0	24	22	9.0	1
Ervaco Kobenhavn	Copenhagen	NA	237.2	185.2	28.0	1,078.2	833.4	1,980.0	9,000.0	N/A	N/A	N/A	1
DOMINICAN REPUBLIC													**Exchange rate: 1.00 DR dollar**
Young & Rubicam Damaris	Santo Domingo	MJ	5,106.0	3,675.0	39.0	34,057.0	24,512.0	5,106.0	34,057.0	99	94	5.0	N/A
McCann-Erickson Dominicana	Santo Domingo	MJ	1,590.0	1,152.0	38.0	10,605.0	7,684.0	1,590.0	10,605.0	27	27	0.0	N/A
Leo Burnett Co.	Santo Domingo	MJ	512.0	265.0	93.0	3,414.0	1,767.0	512.0	3,414.0	23	20	15.0	1
Leon/Aife/MFP	Santo Domingo	MJ	315.3	221.1	42.0	2,103.3	1,475.0	315.3	2,103.3	14	15	-7.0	1
FCB/Siboney	Santo Domingo	MJ	304.7	281.5	8.0	2,032.2	1,877.7	304.7	2,032.2	22	21	5.0	1
DUBAI													**Exchange rate: 0.2725 dirham**
Madco Gulf (Dubai)	Dubai	NA	1,135.0	1,120.0	1.0	4,500.0	4,600.0	DHS N/A	DHS N/A	N/A	N/A	N/A	1
Thompson Advertising Middle East	Dubai	MJ	1,025.7	791.6	30.0	6,841.2	5,280.1	3,763.9	25,105.2	27	27	0.0	1
ECUADOR													**Exchange rate: 0.00694 sucre**
Norlop Thompson	Guayaquil	MN	1,637.5	1,134.3	44.0	10,922.1	7,562.7	S235,950.6	S1.57 bill.	105	92	14.0	2
McCann-Erickson (Ecuador)	Guayaquil	MJ	1,038.0	719.0	44.0	6,923.0	4,796.0	149,552.0	997,512.0	53	50	6.0	N/A
Veritas Publicitaria	Guayaquil/ Quito	NE	842.3	509.5	65.0	5,176.3	3,012.2	121,366.2	745,858.6	62	51	22.0	2
FCB/Artefilme	Guayaquil	MJ	299.7	259.1	16.0	1,998.9	1,728.5	43,183.0	288,030.0	34	35	-3.0	2
EGYPT													**Exchange rate: 0.7455 E pound**
Advertising & Marketing Associates, Leo Burnett	Cairo	MN	224.4	294.5	-24.0	1,496.0	1,961.9	E£301.0	E£2,007.0	31	31	0.0	1
EL SALVADOR													**Exchange rate: 0.2016 colon**
APCU de El Salvador	San Salvador	MN	439.5	131.0	235.0	2,927.0	873.6	C2,180.0	C14,518.8	35	9	289.0	1
McCann-Erickson	San Salvador	MJ	386.0	321.0	20.0	2,575.0	2,141.0	1,913.0	12,760.0	30	31	-3.0	N/A
FINLAND													**Exchange rate: 0.1939 markka**
Taucher Group	Helsinki	NA	9,985.0	10,067.0	-1.0	66,599.0	67,150.0	Fmk51,495.0	Fmk343,471.0	245	266	-8.0	10
Oy Liikemainonta-McCann	Helsinki	MJ	6,865.0	7,092.0	-3.0	45,790.0	47,304.0	35,405.0	236,151.0	109	110	-1.0	N/A
Oy Sek	Helsinki	NA	6,166.0	5,157.4	20.0	37,842.5	33,786.4	31,800.0	175,400.0	105	84	25.0	1
Mainosyhtyma Oy	Helsinki	NA	5,962.0	5,527.3	8.0	45,300.0	42,847.6	30,748.0	233,626.0	128	139	-8.0	4
Finnad-Bates	Helsinki	MJ	5,099.8	4,411.6	16.0	34,015.5	29,425.5	26,301.0	175,428.0	83	79	5.0	5
Markkinointi Viherjuuri Oy	Helsinki	NA	4,935.0	4,938.0	0.0	33,354.0	33,163.0	25,449.0	172,014.0	95	93	2.0	1
Erva-Latvala Oy	Helsinki	NA	4,715.2	4,168.9	13.0	31,450.1	27,806.2	24,317.4	162,197.3	91	98	-7.0	2
Turkama & Kumppanit Oy	Helsinki	NA	4,401.5	5,235.3	-20.0	29,300.0	34,700.0	22,700.0	151,400.0	85	107	-21.0	2
SSC&B:Lintas Worldwide, Finland	Helsinki	MJ	3,181.5	3,439.0	-7.0	20,802.9	22,948.1	16,408.2	107,286.8	60	66	-9.0	1
Tehomainos-J. Walter Thompson Oy	Helsinki	MN	2,753.4	2,753.4	0.0	18,362.3	18,362.3	14,200.0	94,700.0	50	63	-21.0	1
Oy AC-Ilmo	Helsinki	NE	2,265.5	2,166.7	5.0	18,515.7	17,888.1	11,684.0	95,491.0	45	38	18.0	2
Ogilvy & Mather Oy	Helsinki	MJ	2,116.6	2,115.3	0.0	16,400.7	15,750.4	10,915.8	84,583.4	41	42	-2.0	1
Oy Interplan	Helsinki	NE	1,987.6	2,010.0	-1.0	13,257.3	12,806.8	10,250.8	68,367.5	40	40	0.0	1
Kauppamainos Oy	Helsinki	NA	1,862.4	2,153.4	-14.0	12,415.8	14,355.7	9,604.8	64,032.0	30	34	-12.0	1
Oy Valotorni	Helsinki	NA	1,740.7	1,522.4	14.0	11,604.9	10,197.1	8,977.5	59,850.0	38	38	0.0	1
Markkinointi Topitorma Oy	Helsinki	NA	1,667.0	2,016.6	-16.0	12,073.0	13,974.0	8,700.0	62,264.0	34	41	-17.0	N/A
Markkinointiryhmaa Oy	Helsinki	NA	1,369.4	1,182.8	16.0	9,129.5	8,127.2	7,062.5	47,083.4	32	27	19.0	1
DMB&B Oy	Helsinki	MJ	1,081.0	969.0	12.0	7,208.0	6,459.0	5,576.0	37,173.0	21	20	5.0	1
Ajan Mainos Oy	Helsinki	NA	213.3	264.1	-19.0	1,013.2	1,761.5	1,100.0	7,337.0	7	8	-13.0	1
FRANCE													**Exchange rate: 0.1403 franc**
Publicis Conseil Group	Paris	MJ	72,721.0	60,529.6	20.0	472,334.0	408,273.0	FF518,325.0	FF3.33 bill.	1,047	1,040	1.0	14
Belier	Neuilly	MJ	72,660.0	56,280.0	29.0	484,600.0	373,400.0	519,000.0	3.46 bill.	1,018	792	29.0	32
RSCG France	Paris	MJ	49,806.5	39,424.3	26.0	328,700.0	260,116.0	355,000.0	2.34 bill.	380	N/A	N/A	27
HCM France	Neuilly	MJ	37,880.0	32,970.0	15.0	252,700.0	220,000.0	270,000.0	1.80 bill.	508	495	3.0	N/A
Univas	Neuilly	MJ	28,761.5	26,236.1	10.0	194,596.1	176,216.8	205,000.0	1.39 bill.	425	218	95.0	N/A
BDDP Group	Paris	NA	28,200.3	20,062.9	41.0	188,002.0	133,846.2	201,000.0	1.34 bill.	420	350	20.0	N/A
Polaris	Paris	MJ	28,192.0	25,429.0	11.0	189,868.0	166,779.0	201,000.0	1.35 bill.	500	N/A	N/A	8
Young & Rubicam France	Paris	MJ	25,415.0	21,147.0	20.0	169,518.0	141,053.0	181,209.0	1.21 bill.	451	379	19.0	N/A

1987 EDITION **FOREIGN AGENCY REPORT** FRANCE-GERMANY

Agency	City		Gross income 1986 ($000)	Gross income 1985 ($000)	Percent change income	Billings 1986 ($000)	Billings 1985 ($000)	Gross income 1986 ($000; national currency)	Billings 1986 ($000; national currency)	Employes 1986	Employes 1985	Percent change	Number offices
DDB Needham Worldwide	Paris	MJ	23,149.5	19,978.7	16.0	154,330.0	133,285.0	165,000.0	1.10 bill.	242	241	0.0	10
Saatchi & Saatchi Compton France	Paris	MJ	21,746.5	17,958.4	21.0	144,990.2	119,782.5	155,000.0	1.03 bill.	255	230	11.0	8
SSC&B:Lintas Worldwide	Paris	MJ	21,635.1	18,245.1	19.0	148,423.1	123,543.0	154,206.0	1.06 bill.	218	211	3.0	4
FCA!	Suresnes	NA	14,072.0	13,623.1	3.0	93,860.7	90,866.3	100,300.0	669,000.0	197	185	6.0	4
McCann-Erickson France	Paris	MJ	12,919.0	12,206.0	6.0	86,170.0	81,414.0	92,083.0	614,194.0	161	155	6.0	N/A
Ogilvy & Mather	Paris	MJ	12,416.6	10,382.2	20.0	82,566.6	69,167.9	88,500.0	588,500.0	150	138	9.0	2
FCB/Effi	Paris	MJ	11,645.0	9,548.5	22.0	77,671.0	63,688.8	83,000.0	553,610.0	168	148	14.0	2
J. Walter Thompson	Paris	MJ	11,574.8	10,219.7	13.0	77,203.6	68,135.0	82,500.0	550,275.0	154	169	-9.0	2
CFRP Alliance	Paris	MJ	11,500.0	10,800.0	6.0	76,700.0	70 850.0	82,000.0	546,670.0	91	88	3.0	N/A
TBWA	Paris	MJ	10,980.0	10,004.8	10.0	73,725.0	66,731.7	78,261.0	525,481.0	110	99	11.0	1
Grey	Paris	MJ	8,592.7	7,358.7	17.0	57,313.1	49,082.8	61,245.0	408,504.0	97	93	4.0	2
Ted Bates	Paris	MJ	8,376.0	7,576.0	11.0	N/A	N/A	59,700.0	N/A	103	112	-8.0	1
Synergie/Bozell, Jacobs, Kenyon & Eckhardt	Paris	MJ	8,277.7	7,604.3	9.0	70,150.0	63,135.0	59,000.0	500,000.0	114	111	3.0	1
CLM/BBDO	Paris	MJ	6,665.0	5,292.1	26.0	43,466.4	34,585.3	47,505.2	309,810.3	97	80	21.0	1
DMB&B	Paris	MJ	6,103.1	7,307.7	-16.0	27,698.9	37,612.3	43,500.0	197,426.0	82	61	34.0	1
M.A.O.	Neuilly	NA	5,275.3	4,068.7	30.0	35,636.2	27,358.5	37,600.0	254,000.0	46	44	5.0	1
BCRC	Paris	NA	5,180.0	4,200.0	23.0	34,300.0	28,000.0	37,000.0	245,000.0	40	50	-20.0	1
Impact	Paris	MN	4,917.7	6,357.3	-23.0	32,801.1	42,403.1	35,051.5	233,793.7	82	101	-19.0	1
Leuthe et Associes	Paris	NA	4,658.0	3,647.8	28.0	25,534.6	19,642.0	33,200.0	182,000.0	35	29	21.0	1
GGK International/Paris	Paris	MJ	4,497.0	4,512.0	-0.0	30,000.0	30,096.0	32,054.6	213,840.0	50	60	-17.0	2
Bordelais Lemeunier/Leo Burnett	Paris	MJ	4,490.0	3,045.0	47.0	29,940.0	20,300.0	32,000.0	213,400.0	61	35	74.0	1
Ogilvy Defrenois Direct	Paris	MJ	4,290.0	3,515.0	22.0	28,614.0	23,445.0	30,581.0	203,975.0	40	46	-13.0	1
Ayer France & Associes	Paris	MJ	4,251.1	4,185.1	2.0	28,354.8	25,545.3	30,300.0	202,101.0	45	52	-13.0	1
RSCG Export	Issy-les-Moulineaux	MJ	3,647.8	2,806.0	30.0	23,991.3	23,149.5	26,000.0	171,000.0	N/A	N/A	N/A	8
Gaudin & Lichtenberg	Paris	MN	3,483.0	3,565.2	-2.0	27,443.0	23,779.6	24,828.0	195,605.0	40	N/A	N/A	1
Eldorado	Paris	MJ	2,623.6	1,964.2	34.0	19,880.5	15,531.2	18,700.0	141,700.0	22	20	10.0	1
Creative Business International	Paris	MJ	2,244.8	4,209.0	-47.0	14,815.6	27,780.0	16,000.0	105,600.0	N/A	N/A	N/A	1
CPV	Paris	MJ	1,971.2	1,936.1	2.0	15,152.4	14,324.6	14,050.0	108,000.0	27	27	0.0	1
Entente Delacroix	Paris	MN	1,280.0	1,245.0	3.0	N/A	N/A	9,125.0	N/A	25	30	-17.0	3
C.P.F.Univas	Paris	MJ	1,202.0	1,150.0	5.0	6,004.0	5,752.0	8,570.0	42,800.0	24	24	0.0	1
Domino Ketchum	Paris	MN	799.7	631.4	27.0	5,456.1	4,209.0	5,700.0	38,888.8	16	12	33.0	1
Merry	Paris	NA	771.7	561.2	38.0	6,313.5	5,050.8	5,500.0	45,000.0	12	10	20.0	1
Bernard Moors & Associes	Paris	MN	771.7	757.6	1.0	N/A	N/A	5,500.0	N/A	18	18	0.0	1
Publicite Claude Michel	Paris	NA	634.2	585.1	8.0	4,229.8	3,903.0	4,520.0	30,148.4	16	15	7.0	1
Herald	Paris	NA	404.8	N/A	N/A	1,949.7	N/A	2,855.0	13,832.7	5	N/A	N/A	1
Mix Communications	Paris	MJ	350.8	252.5	39.0	2,339.5	1,683.7	2,500.0	16,675.0	5	9	-44.0	1
Audour/Soum Scali, McCabe, Sloves	Neuilly	MN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1
GERMANY													**Exchange rate: 0.4436 mark**
Team/BBDO	Duesseldorf	MJ	35,046.0	31,989.0	10.0	233,758.0	213,366.0	DM79,004.0	DM526,957.0	436	426	2.0	6
SSC&B:Lintas	Hamburg	MJ	31,595.4	29,566.4	7.0	210,754.4	197,224.6	71,225.0	475,100.0	394	404	-2.0	2
Ogilvy & Mather	Frankfurt	MJ	27,681.0	21,531.0	29.0	184,500.0	143,593.0	62,402.0	416,000.0	385	330	17.0	7
McCann-Erickson	Frankfurt	MJ	27,547.0	27,947.0	-1.0	183,738.0	186,406.0	62,099.0	414,201.0	336	392	-14.0	N/A
J. Walter Thompson	Frankfurt	MJ	23,270.0	25,309.7	-8.0	155,140.9	168,740.0	52,457.1	349,731.5	341	391	-13.0	7
Young & Rubicam	Frankfurt	MJ	20,430.0	17,613.1	16.0	136,528.0	117,703.0	46,055.0	307,734.1	320	257	25.0	4
Grey-Duesseldorf	Duesseldorf	MJ	18,265.2	18,942.0	-4.0	121,679.5	126,341.0	41,175.0	274,300.0	267	248	8.0	2
Saatchi & Saatchi Compton	Frankfurt	MJ	16,945.5	15,773.0	7.0	112,984.9	105,153.4	38,200.0	254,700.0	206	186	11.0	3
Doyle Dane Bernbach	Duesseldorf	MJ	15,969.6	15,703.4	2.0	106,508.4	104,734.0	36,000.0	240,100.0	244	244	0.0	N/A
Eggert-DYR	Duesseldorf	MN	14,146.4	14,236.9	-1.0	94,353.7	94,601.2	31,889.0	212,700.0	205	199	3.0	4
Wilkens Ayer	Hamburg	MN	14,141.0	13,627.0	4.0	100,482.0	96,074.0	31,878.0	226,514.0	226	216	5.0	2
Michael Conrad & Leo Burnett	Frankfurt	MJ	12,753.1	12,340.1	3.0	85,063.0	82,271.0	28,749.0	191,756.0	199	158	26.0	2
DMB&B	Frankfurt	MJ	11,947.0	13,443.0	-11.0	79,690.0	89,664.0	26,933.0	179,643.0	206	211	-2.0	2
Scholz & Friends	Hamburg	MJ	11,178.1	8,388.7	33.0	74,524.8	55,924.3	25,198.7	168,000.0	145	91	59.0	1
TBWA	Frankfurt	MJ	11,071.0	10,272.9	8.0	73,805.0	68,485.6	24,957.0	166,377.0	106	101	5.0	3
Publicis-Intermarco-Farner	Duesseldorf	MJ	10,114.0	9,449.0	-7.0	67,472.0	63,036.0	22,800.0	152,100.0	120	123	-2.0	4
Ted Bates Werbeagentur	Frankfurt	MJ	9,401.0	8,713.0	8.0	62,703.0	58,114.0	21,192.0	141,351.0	129	130	-1.0	2
Heye Needham & Partner	Munich	MN	9,370.0	9,129.7	3.0	62,503.0	60,906.3	21,122.0	140,900.0	123	129	-5.0	3
GGK Duesseldorf	Duesseldorf	MJ	9,050.0	8,583.7	5.0	59,886.0	57,224.4	20,400.0	135,000.0	114	114	0.0	1
Baums, Mang und Zimmermann	Duesseldorf	NA	9,018.4	8,091.3	11.0	60,153.0	53,943.0	20,330.0	135,601.0	112	106	6.0	1
HCM Duesseldorf	Duesseldorf	MJ	8,561.0	7,807.0	10.0	57,225.0	52,078.0	19,300.0	129,000.0	93	88	6.0	1
Serviceplan	Munich	NA	7,585.6	6,787.1	12.0	50,614.8	45,202.8	17,100.0	114,100.0	78	72	8.0	N/A
Guenter Blaese	Stuttgart	NA	7,528.0	7,446.0	1.0	50,216.0	49,669.0	16,968.1	113,186.9	109	114	-4.0	N/A
von Mannstein Gruppe	Solingen	NA	7,351.3	7,548.3	-3.0	49,017.8	50,348.6	16,572.0	110,500.0	83	88	-6.0	4
Lowe Marschalk Luerzer	Duesseldorf	MJ	7,162.4	6,235.2	15.0	47,773.0	41,589.3	16,146.0	107,694.0	104	135	-16.0	2
Bessere Werbung	Duesseldorf	NA	6,387.4	5,323.2	20.0	42,585.6	35,354.9	14,400.0	96,000.0	43	38	13.0	N/A
Lueders	Cologne	NA	6,121.7	5,545.0	10.0	40,811.2	37,040.6	13,800.0	92,000.0	48	48	0.0	N/A
Spiess & Ermisch	Duesseldorf	NA	5,988.6	7,940.4	-25.0	39,924.0	52,832.8	13,500.0	90,000.0	70	81	-14.0	N/A
Hildmann Simon Rempen & Schmitz/SMS	Duesseldorf	MJ	5,403.4	3,470.4	56.0	35,488.0	23,067.2	12,180.9	80,000.0	53	47	13.0	1
MWI Markenwerbung International	Hamburg	MJ	5,345.0	5,866.0	-9.0	35,651.0	39,166.0	12,050.0	80,374.0	88	85	4.0	1
Acon	Cologne	NA	5,278.8	7,186.3	-27.0	35,221.8	47,731.4	11,900.0	79,400.0	59	74	-20.0	N/A
Ernst & Partner	Duesseldorf	NA	4,968.3	4,036.8	23.0	33,136.9	26,926.5	11,200.0	74,700.0	95	65	46.0	N/A
Borsch Stengel & Partner	Frankfurt	NA	4,790.9	4,081.1	17.0	31,939.2	27,104.0	10,800.0	72,000.0	60	50	20.0	N/A
Springer & Jacoby Werbeagentur	Hamburg	NA	4,573.2	3,016.5	52.0	28,700.9	20,139.4	9,700.0	64,700.0	63	45	40.0	1
FCB Deutschland	Frankfurt	MJ	4,515.0	6,792.0	-34.0	30,118.0	45,305.0	10,179.0	67,894.0	75	87	-14.0	3
RSCG, Butter, Rang	Duesseldorf	MJ	4,302.0	1,910.0	125.0	28,700.0	12,730.0	9,700.0	64,700.0	55	30	83.0	1
Hakuhodo	Duesseldorf	MJ	3,903.7	2,439.8	60.0	26,039.3	16,191.4	8,800.0	58,700.0	45	31	45.0	N/A
Agenta Werbeagentur	Muenster	NA	3,681.9	3,415.7	8.0	24,575.4	22,889.8	8,300.0	55,400.0	52	50	4.0	N/A
Wensauer & Partner	Ludwigsburg	NA	3,420.2	3,016.5	13.0	22,801.0	20,139.4	7,710.0	51,400.0	45	44	2.0	1
GGK Frankfurt	Frankfurt	MJ	2,928.0	2,728.0	7.0	19,518.0	18,188.0	6,600.0	44,000.0	38	30	27.0	1
Die Gilde Werbeagentur	Hamburg	NA	2,694.9	2,428.7	11.0	18,054.5	16,191.4	6,075.0	40,700.0	32	30	7.0	1

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
								($000; national currency)					
Consell	Frankfurt	MJ	2,229.1	4,657.8	-52.0	14,860.6	31,067.5	5,025.0	33,500.0	33	50	-34.0	1
Erdmann & Partner	Duesseldorf	NA	2,218.9	2,423.8	-8.0	14,798.5	16,169.2	5,002.0	33,360.0	29	29	0.0	1
Durana Ketchum	Frankfurt	MN	2,040.6	2,661.6	-23.0	13,620.0	17,837.2	4,600.0	30,700.0	19	20	-5.0	1
Schmittgall Werbeagentur	Stuttgart	NA	1,109.0	887.2	25.0	7,541.2	5,766.8	2,500.0	17,000.0	19	15	27.0	1
Eiler & Riemel/BBDO	Munich	MN	1,020.3	798.5	28.0	6,787.1	5,323.2	2,300.0	15,300.0	35	32	9.0	1
Wirz & Hafner Werbeberatung	Frankfurt	MJ	754.2	754.2	0.0	5,100.0	5,100.0	1,700.0	11,400.0	11	10	10.0	1
Handley, Smith & Partners	Duesseldorf	MJ	457.0	210.0	118.0	2,290.0	1,000.0	1,030.1	5,161.7	8	5	46.0	1
GREECE									**Exchange rate: 0.0071 drachma**				
Spot/Thompson	Athens	MN	2,254.0	1,605.0	40.0	18,460.0	14,243.0	Dr317,444.0	Dr2.60 bill.	75	52	44.0	1
Bold Advertising	Athens	NA	1,927.7	1,434.2	34.0	13,490.0	10,082.0	271,500.0	1.90 bill.	56	51	10.0	1
BBDO Advertising	Athens	MJ	1,288.4	972.7	32.0	8,593.5	6,488.2	181,463.0	1.21 bill.	54	54	0.0	1
Adel-Compton S.A.	Athens	MJ	1,235.4	766.8	61.0	8,591.0	5,112.0	174,000.0	1.21 bill.	45	37	22.0	1
SSC&B: Lintas Athens	Athens	MJ	1,158.3	775.8	49.0	8,392.2	5,860.8	163,145.0	1.18 bill.	35	32	9.0	1
Euro-Leo Burnett Athens	Athens	MJ	1,155.0	980.0	18.0	7,702.0	6,531.0	162,701.0	1.08 bill.	50	54	-7.0	1
McCann-Erickson	Athens	MJ	974.0	613.0	59.0	6,497.0	4,089.0	137,230.0	915,324.0	43	32	34.0	N/A
Olympic/DDB Needham	Athens	NE	947.9	813.3	17.0	6,390.0	5,424.2	133,500.0	900,000.0	30	33	-9.0	1
Alector Advertising	Athens	NA	816.5	642.2	27.0	6,184.1	4,757.0	115,000.0	871,000.0	40	36	11.0	1
J.N. Leoussis Advertising	Athens	NA	795.2	511.2	56.0	5,325.0	3,408.0	112,000.0	750,000.0	30	28	7.0	1
Gnomi/FCB	Athens	MN	791.2	488.9	62.0	5,277.4	3,261.0	111,438.6	743,295.8	54	41	32.0	1
Ted Bates Advertising	Athens	MJ	790.9	814.4	-3.0	5,254.0	5,282.7	[illegible],400.0	740,000.0	40	41	-2.0	2
Lambda Alpha Advertising	Athens	NE	473.2	376.5	26.0	3,943.1	2,538.2	66,643.4	555,362.0	21	21	0.0	1
Grafis Advertising	Athens	MN	467.2	371.3	26.0	3,116.2	2,476.5	65,800.0	438,900.0	29	25	16.0	1
Echo Advertising	Thessaloniki	NA	439.5	324.0	36.0	2,929.9	2,159.8	61,899.9	412,660.0	29	26	12.0	2
Interpress S.A.	Athens	NA	361.1	N/A	N/A	4,100.7	N/A	50,857.7	577,560.2	34	N/A	N/A	1
DMB&B Ergon	Athens	MJ	331.7	305.3	9.0	2,212.8	1,952.5	46,725.0	311,655.0	22	22	0.0	1
Geo II Advertising	Athens	NA	266.1	237.0	12.0	2,334.1	1,517.2	37,477.0	328,752.0	15	12	25.0	1
Epsilon-Epsilon	Athens	NA	222.7	231.0	-4.0	1,782.1	1,136.0	31,366.0	251,000.0	18	15	20.0	1
Sigma Ltd.	Athens	NA	177.5	151.0	18.0	1,184.0	1,006.2	25,000.0	166,750.0	17	17	0.0	1
Chapman/Palavidis	Athens	NA	120.0	99.4	21.0	995.0	745.5	16,900.0	140,000.0	11	11	0.0	1
Interspot	Athens	NA	82.0	47.4	73.0	887.6	602.2	11,560.6	125,016.0	12	8	50.0	1
GUATEMALA									**Exchange rate: 1.00 dollar**				
McCann-Erickson Centroamericana	Guatamala City	MJ	1,826.0	1,045.0	75.0	12,179.0	6,970.0	$1,826.0	$12,179.0	50	45	11.0	N/A
APCU Thompson	Guatemala City	MN	1,331.0	1,035.0	29.0	8,865.0	6,900.3	1,331.0	8,865.0	40	42	-5.0	1
Concepto	Guatemala City	NE	836.5	511.3	64.0	2,963.0	1,324.2	836.5	2,963.0	25	23	9.0	1
FCB Siboney	Guatemala City	MJ	447.2	270.0	66.0	2,982.7	1,800.7	447.2	2,982.7	57	32	78.0	1
Publimerca	Guatemala City	NA	195.3	125.0	56.0	972.0	625.0	195.3	972.0	26	22	18.0	1
HONDURAS									**Exchange rate: 0.4359 lempira**				
McCann-Erickson Centroamericana	Tegucigalpa	MJ	527.0	450.0	17.0	3,515.0	3,002.0	L1,209.0	L8,064.0	29	23	26.0	N/A
APCU de Honduras	Tegucigalpa	MJ	210.0	183.4	15.0	1,400.0	1,222.9	481.8	3,208.7	20	18	11.0	2
HONG KONG									**Exchange rate: 0.1282 HK dollar**				
Leo Burnett Ltd.	Hong Kong	MJ	5,665.0	3,946.0	44.0	37,787.0	26,310.0	HK$44,190.0	HK$294,747.0	168	150	12.0	1
Ogilvy & Mather	Hong Kong	MJ	5,412.7	4,684.8	16.0	36,102.8	31,247.8	42,220.9	281,613.4	135	125	8.0	1
DYR Ltd.	Hong Kong	MJ	3,083.0	2,824.0	9.0	19,676.0	17,452.4	24,048.4	153,472.8	90	88	2.0	2
J. Walter Thompson	Hong Kong	MJ	2,994.0	2,250.0	33.0	19,960.0	15,000.0	23,355.1	155,700.0	93	77	21.0	1
McCann-Erickson	Hong Kong	MJ	2,945.0	2,633.0	12.0	19,643.0	17,562.0	22,971.0	153,217.0	86	90	-4.0	N/A
Ted Bates Ltd.	Hong Kong	MJ	2,904.0	2,501.0	16.0	21,385.1	17,179.8	22,652.4	166,810.7	105	97	8.0	1
AMC-Saatchi & Saatchi	Hong Kong	MJ	2,306.1	1,789.8	29.0	15,384.0	11,931.9	17,988.0	120,000.0	60	57	5.0	1
SSC&B:Lintas	Hong Kong	MJ	2,289.0	1,163.0	97.0	15,268.0	8,029.0	17,855.0	119,093.0	89	39	128.0	1
DDB Needham Worldwide	Hong Kong	MJ	2,156.0	1,370.0	57.0	14,379.0	9,135.0	16,816.0	112,163.0	60	61	-2.0	1
Foote, Cone & Belding	Hong Kong	MJ	1,811.7	1,241.7	46.0	12,084.3	8,282.2	14,132.1	94,261.0	58	45	29.0	1
BBDO Hong Kong Ltd.	Hong Kong	MJ	1,635.0	445.5	267.0	10,897.0	3,116.9	12,750.0	83,000.0	58	34	71.0	1
Mojo MDA S.E. Asia	Hong Kong	NA	1,599.8	N/A	N/A	9,998.7	N/A	2,363.4	14,771.3	69	N/A	N/A	2
People & Grey Advertising	Hong Kong	MJ	1,415.3	1,262.8	12.0	9,440.2	8,422.7	11,040.0	73,636.8	52	50	4.0	1
Synergie Communications	Hong Kong	MN	1,272.0	522.4	143.0	6,682.0	3,484.1	9,921.6	52,119.6	43	32	34.0	1
Bozell, Jacobs, Kenyon & Eckhardt	Hong Kong	MJ	1,025.0	806.0	27.0	6,837.0	5,373.0	7,995.0	53,327.0	43	42	2.0	1
Modern Advertising	Hong Kong	NA	987.0	876.9	13.0	6,580.0	5,845.9	7,700.0	51,333.0	35	33	6.0	1
Far East-Ketchum	Hong Kong	MN	930.0	808.0	15.0	6,200.0	5,389.0	7,254.0	48,360.0	35	35	0.0	1
Results (HK)	Hong Kong	MJ	883.6	705.0	25.0	5,893.5	4,702.5	6,892.2	45,971.2	29	27	7.0	1
DMB&B	Hong Kong	MJ	872.9	732.3	19.0	5,822.7	5,085.8	6,809.0	45,419.0	36	34	6.0	1
Hong Kong (FE) Advertising	Hong Kong	NA	853.5	755.0	13.0	5,690.0	5,034.0	6,658.0	44,380.0	33	33	0.0	1
Lee Davis Advertising	Hong Kong	NA	542.7	657.7	17.0	4,386.0	4,384.4	4,233.0	34,212.0	33	31	6.0	1
Chuo Senko Ad	Hong Kong	NA	384.6	371.8	3.0	2,410.0	2,500.0	3,000.0	18,800.0	17	17	0.0	1
INDIA									**Exchange rate: 0.0805 rupee**				
Hindustan Thompson Associates	Bombay	NE	5,362.5	4,393.3	22.0	35,750.1	29,288.6	Rs66,615.0	Rs444,100.0	700	589	19.0	5
Lintas India	Bombay	MN	4,788.4	3,417.3	40.0	31,938.5	22,793.3	59,483.0	396,751.0	247	235	5.0	5
Ogilvy Benson & Mather	Bombay	MN	2,959.0	2,152.2	37.0	19,737.0	14,348.3	36,758.0	245,175.0	310	288	8.0	6
Everest Advertising	Bombay	MN	2,305.7	1,568.5	47.0	16,051.7	10,461.9	28,642.3	199,400.0	237	205	16.0	4
R.K. Swamy Advertising Associates	Madras	NE	2,173.5	1,811.3	20.0	14,500.0	12,100.0	27,000.0	180,000.0	273	250	9.0	6
Chaitra Advertising	Bombay	NA	1,970.0	1,440.0	36.0	13,140.0	9,620.0	24,500.0	163,300.0	220	217	1.0	3
Advertising & Sales Promotion	New Delhi	NA	1,770.9	1,609.8	10.0	9,838.0	8,943.2	21,870.0	121,500.0	304	295	3.0	7
Jaisons Advertising Private	Bombay	NA	1,557.1	1,354.0	15.0	8,823.4	7,672.5	19,342.4	109,607.1	181	175	3.0	8
Sista's Private Ltd.	Bombay	NE	1,554.2	1,157.1	34.0	10,368.4	7,728.0	19,307.0	128,800.0	250	229	9.0	6

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
								($000; national currency)					
Contract Advertising	Bombay	NE	1,215.6	320.4	279.0	8,108.0	2,131.6	15,100.0	100,720.0	197	66	198.0	5
Shilpi Advertising	Bombay	NA	1,005.0	910.0	10.0	6,706.0	6,071.0	12,490.0	83,308.0	142	136	4.0	4
daCunha Associates	Bombay	NA	970.0	730.0	33.0	6,460.0	4,830.0	12,047.4	80,233.2	66	46	43.0	3
Trikaya Advertising	Bombay	NE	760.0	502.0	51.0	4,660.0	3,390.0	9,420.0	57,850.0	96	93	3.0	4
Pressman Advertising & Marketing	Calcutta	NA	644.0	354.2	82.0	6,842.5	3,501.8	8,000.0	85,000.0	85	78	9.0	4
Creative Unit	Bombay	NA	602.2	545.1	10.0	4,014.7	3,636.1	7,480.8	49,872.0	53	49	8.0	2
National Advertising Service	Bombay	NA	547.4	378.4	45.0	3,622.5	2,616.3	6,800.0	45,000.0	60	54	11.0	4
Contour Advertising	Bombay	NA	458.9	278.9	65.0	2,415.0	1,690.5	5,699.8	3,464.9	56	48	19.0	4
Raka Advertising & Marketing	Bombay	NA	303.5	191.1	59.0	1,803.0	1,377.3	3,770.6	22,397.9	42	39	8.0	1
Apex Advertising	Bombay	NA	241.5	161.1	50.0	2,817.5	1,875.5	3,000.0	35,000.0	65	50	30.0	2
INDONESIA												**Exchange rate: 0.000841 rupiah**	
CITRA: Lintas Indonesia	Jakarta	NE	2,607.0	1,923.0	36.0	17,389.0	12,829.0	Rup3.10 bill.	Rup20.68	77	77	0.0	1
Fortune	Jakarta	NE	836.8	N/A	N/A	5,971.1	N/A	995,000.0	7.10 bill.	45	N/A	N/A	1
P. T. Bates Mulia Indonesia	Jakarta	NE	571.8	494.8	16.0	4,060.3	3,590.0	679,853.0	4.83 bill.	38	38	0.0	1
Ad Force	Jakarta	NE	477.1	289.2	65.0	2,503.5	1,429.7	567,279.0	2.98 bill.	41	34	21.0	1
P.T. Perwanal	Jakarta	MN	455.0	429.0	6.0	2,521.0	2,466.0	541,208.0	3.00 bill.	40	38	5.0	1
P.T. Sulisto Inc.	Jakarta	NE	273.4	227.0	20.0	2,402.0	2,025.0	325,125.0	2.86 bill.	36	40	-10.0	1
IRELAND												**Exchange rate: 1.313 pound**	
McConnells Advertising	Dublin	NA	3,402.3	3,163.7	8.0	22,532.0	20,960.0	I£2,597.2	I£17,200.0	104	104	0.0	2
O'Kennedy-Brindley	Dublin	MJ	2,494.7	2,048.4	22.0	12,867.4	11,379.8	1,900.0	9,800.0	60	48	25.0	1
Wilson Hartnell Advertising	Dublin	MJ	2,368.6	1,926.4	23.0	15,798.8	12,849.1	1,804.0	12,032.6	60	54	11.0	1
Hunter Advertising	Dublin	MJ	2,112.6	1,939.0	9.0	11,742.8	10,772.6	1,609.0	8,943.5	33	35	-6.0	1
Peter Owens	Dublin	NA	2,107.4	1,280.2	65.0	14,049.1	8,534.5	1,605.0	10,700.0	46	43	7.0	1
Brian Cronin & Associates	Dublin	NA	2,017.9	1,627.5	24.0	13,453.0	10,849.3	1,536.9	10,246.0	26	23	13.0	1
Bell Advertising	Dublin	MJ	1,644.1	1,525.5	8.0	10,966.2	10,175.2	1,252.2	8,352.0	42	47	-11.0	1
Young Advertising	Dublin	MJ	1,409.0	1,339.0	5.0	9,388.0	8,928.0	1,073.0	7,150.0	30	30	0.0	1
Arks Alliance	Dublin	MJ	1,383.0	1,941.0	-29.0	9,224.0	12,519.0	1,053.0	7,025.0	30	38	-21.0	1
O'Keeffes Ltd.	Dublin	NA	1,122.8	1,356.7	-17.0	7,245.3	8,602.0	855.2	5,518.1	23	28	-18.0	2
Aubrey Fogarty Associates	Dublin	NA	738.6	689.3	7.0	4,000.0	3,720.0	562.5	3,750.0	22	20	10.0	3
DMB&B Dublin	Dublin	MJ	61.6	N/A	N/A	410.6	N/A	42.0	279.7	4	N/A	N/A	1
ISRAEL												**Exchange rate: 0.675 shekel**	
Israeli agencies are listed in the footnotes at the end of the section.													
ITALY												**Exchange rate: 0.000648 lira**	
McCann-Erickson Italiana	Milan	MJ	23,132.0	19,776.0	17.0	154,290.0	131,906.0	IL35.70 bill.	IL238.11 bill.	298	271	10.0	N/A
Armando Testa	Turin	NA	19,569.6	14,061.6	39.0	131,544.0	94,608.0	30.20 bill.	203.00 bill.	241	205	18.0	3
Young & Rubicam Italia	Milan	MJ	19,440.0	13,737.6	42.0	126,123.0	91,547.0	30.00 bill.	194.63 bill.	199	179	11.0	N/A
J. Walter Thompson Italia	Milan	MJ	16,789.9	14,696.5	14.0	111,988.4	97,981.7	25.91 bill.	172.82 bill.	210	199	6.0	2
Foote, Cone & Belding	Milan	MJ	15,338.1	14,308.3	7.0	102,305.0	95,436.5	23.67 bill.	157.88 bill.	147	190	-23.0	3
Mac Group Italia	Milan	NA	14,058.4	7,212.9	95.0	92,353.0	41,288.0	21.70 bill.	142.52 bill.	131	102	28.0	7
Saatchi & Saatchi Compton	Milan	MJ	13,997.0	6,512.4	115.0	93,312.0	34,840.0	21.60 bill.	144.00 bill.	126	90	40.0	2
Italia/BBDO	Milan	MN	13,122.0	10,692.0	23.0	87,480.0	71,316.0	20.25 bill.	135.00 bill.	118	112	5.0	8
ATA Univas	Milan	MJ	12,629.7	10,385.5	22.0	84,240.0	69,271.2	19.49 bill.	130.00 bill.	110	100	10.0	4
Livraghi Ogilvy & Mather	Milan	MN	10,478.8	8,176.9	28.0	69,893.5	52,646.1	16.17 bill.	107.85 bill.	172	126	37.0	6
TBWA Italia	Milan	MJ	10,213.8	9,072.0	13.0	81,000.0	69,400.0	15.76 bill.	125.00 bill.	112	109	3.0	2
SSC&B:Lintas	Milan	MJ	9,688.1	7,715.4	26.0	68,280.8	55,496.3	14.95 bill.	105.37 bill.	144	134	7.0	3
DMB&B	Bologna	MJ	9,683.2	7,898.0	23.0	64,587.0	52,679.5	14.94 bill.	99.67 bill.	163	141	16.0	4
Milano & Grey	Milan	MJ	8,618.4	7,646.4	13.0	60,264.0	52,812.0	13.30 bill.	93.00 bill.	90	89	1.0	2
Pirella Goettsche Lowe Marschalk	Milan	MJ	5,740.6	4,239.1	35.0	42,860.0	28,275.1	8.86 bill.	66.14 bill.	68	59	15.0	3
RSCG Mezzano Costantini Mignani	Milan	MJ	5,443.0	3,434.0	59.0	47,304.0	31,752.0	8.40 bill.	73.00 bill.	58	50	16.0	1
Ted Bates & Co.	Milan	MJ	5,331.0	4,626.0	15.0	40,697.0	37,015.0	8.23 bill.	62.80 bill.	70	70	0.0	1
P.T. Needham	Milan	MN	4,620.2	4,399.9	5.0	30,812.4	24,624.0	7.13 bill.	47.55 bill.	N/A	37	N/A	1
HCM/WE	Turin	MJ	4,615.0	2,527.5	83.0	30,800.0	16,860.0	7.12 bill.	47.50 bill.	59	38	50.0	2
Publinter Ayer	Milan	MJ	4,523.0	3,395.5	33.0	40,776.0	28,317.6	6.98 bill.	62.93 bill.	63	47	34.0	3
Leo Burnett-Italy	Milan	MJ	4,386.0	3,888.0	13.0	34,992.0	25,919.0	6.77 bill.	54.00 bill.	69	64	8.0	1
Bozell, Jacobs, Kenyon & Eckhardt e Associati	Milan	JV	4,276.8	3,045.6	40.0	35,834.0	21,708.0	6.60 bill.	55.30 bill.	56	42	33.0	2
CBC	Milan	NA	3,615.8	5,896.8	-39.0	24,105.6	39,333.6	5.58 bill.	37.20 bill.	34	69	-51.0	2
B Communications	Milan	NE	3,602.9	3,166.1	14.0	31,897.2	25,330.3	5.56 bill.	49.22 bill.	45	41	10.0	1
Promarco Advertising	Milan	NA	2,730.0	1,542.2	77.0	19,500.0	11,016.0	4.20 bill.	30.00 bill.	30	20	50.0	1
Michele Rizzi/GGK	Milan	MJ	2,665.0	2,151.4	24.0	19,500.0	15,409.4	4.10 bill.	30.00 bill.	21	27	-22.0	1
BRB	Milan	NA	2,500.0	2,285.0	9.0	16,000.0	15,230.0	3.68 bill.	23.53 bill.	28	26	8.0	2
PubbliMarket Alliance	Milan	MN	1,924.6	1,153.4	67.0	13,550.0	9,201.6	2.97 bill.	20.90 bill.	24	23	4.0	2
Publicis Milano	Milan	MJ	1,623.0	1,633.0	-1.0	14,132.0	11,162.0	2.51 bill.	21.1 bill.	31	27	15.0	1
Gandin & Associati	Milan	NA	1,274.0	1,587.6	-20.0	7,800.0	9,720.0	1.87 bill.	11.47 bill.	N/A	N/A	N/A	1
Columbia Marketing	Milan	MJ	1,134.8	682.9	66.0	7,565.4	4,552.8	1.75 bill.	11.68 bill.	12	-12	0.0	1
Dorland Italiana	Milan	MN	1,069.2	939.6	14.0	7,128.0	6,264.0	1.65 bill.	11.00 bill.	22	29	-24.0	2
CCP Positioning	Milan	NA	972.0	648.0	50.0	6,480.0	4,536.0	1.50 bill.	10.00 bill.	12	10	20.0	1
Broucc & DDB	Milan	MN	945.4	N/A	N/A	6,826.0	N/A	1.46 bill.	10.53 bill.	23	N/A	N/A	1
Pubbli Dan Wirz	Milan	MN	842.4	712.8	18.0	5,619.0	4,754.0	1.30 bill.	8.67 bill.	15	13	15.0	1
IVORY COAST												**Exchange rate: 0.02806 CFA franc**	
SSC&B:Lintas Worldwide	Abidjan	MJ	886.7	671.9	32.0	5,914.1	4,481.3	CFA315,993.0	CFA2.11 bill.	15	13	15.0	1

Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
			($000)			($000)		($000; national currency)					
JAMAICA													**Exchange rate: 0.1927 J dollar**
Dunlop Corbin Compton	Kingston	MJ	878.2	658.9	33.0	5,857.2	4,394.7	J$4,556.8	J$30,395.4	40	37	8.0	1
McCann-Erickson (Jamaica)	Kingston	MJ	747.0	646.0	16.0	4,982.0	4,309.0	3,877.0	25,860.0	39	37	5.0	N/A
Lindo/FCB Communications	Kingston	MN	299.8	239.9	25.0	1,999.9	1,600.3	1,556.0	10,378.4	26	26	0.0	1
JAPAN													**Exchange rate: 0.005769 yen**
Dentsu Inc.	Tokyo	NA	681,000.0	661,230.0	3.0	5.31 bill.	5.07 bill.	Y118.05 bill.	Y920.86 bill.	5,673	5,643	1.0	34
Hakuhodo Inc.	Tokyo	NA	309,579.0	280,457.7	10.0	2.27 bill.	2.16 bill.	53.66 bill.	394.29 bill.	2,957	2,911	2.0	21
Dai-Ichi Kikaku	Tokyo	NA	98,739.0	94,822.0	4.0	724,281.0	677,880.0	17.12 bill.	125.54 bill.	574	560	3.0	11
Tokyu Advertising Agency	Tokyo	NA	83,801.5	74,202.1	13.0	646,963.1	629,866.1	14.53 bill.	112.14 bill.	742	711	4.0	7
Daiko Advertising	Osaka	NA	82,040.0	81,905.0	0.0	693,735.0	688,449.0	14.22 bill.	120.25 bill.	1,370	1,375	0.0	37
I&S Corp.	Tokyo	NA	51,822.8	48,424.3	7.0	398,637.0	348,383.4	8.98 bill.	69.10 bill.	700	680	3.0	14
Asatsu	Tokyo	MN	51,101.8	46,440.5	10.0	400,662.8	362,927.8	8.86 bill.	69.45 bill.	626	600	4.0	11
McCann-Erickson Hakuhodo	Tokyo	MJ	50,346.0	46,189.0	9.0	335,808.0	308,081.0	8.73 bill.	58.21 bill.	467	478	-2.0	N/A
Yomiko Advertising	Tokyo	NA	48,918.4	48,389.8	1.0	361,823.9	363,026.4	8.48 bill.	62.72 bill.	673	700	-4.0	12
Asahi Advertising	Tokyo	NE	44,556.2	44,764.0	0.0	280,518.6	275,223.7	7.72 bill.	48.63 bill.	793	846	-6.0	27
Chuo Senko Advertising	Tokyo	NA	31,900.0	32,300.0	-1.0	224,400.0	223,000.0	5.53 bill.	38.91 bill.	301	305	-1.0	8
Nihon Keizaisha Advertising	Tokyo	NA	25,548.0	23,415.4	9.0	152,651.5	148,086.6	4.43 bill.	26.46 bill.	463	454	2.0	12
Man-Nen-Sha	Osaka	NE	25,364.3	23,995.9	6.0	339,489.0	325,096.6	4.40 bill.	58.85 bill.	492	498	-1.0	13
Kyodo Advertising	Tokyo	NA	25,292.3	24,987.5	1.0	168,615.8	166,583.4	4.38 bill.	29.23 bill.	380	388	-2.0	10
Orikomi Advertising	Tokyo	NA	24,965.7	25,173.8	-1.0	241,287.0	234,301.7	4.33 bill.	41.82 bill.	355	347	2.0	5
J. Walter Thompson Japan	Tokyo	MJ	23,040.8	23,554.6	-2.0	153,681.9	157,038.6	3.99 bill.	26.64 bill.	311	323	-4.0	2
Meitsu Advertising	Tokyo	NA	19,972.0	19,291.5	4.0	124,841.0	120,572.1	3.46 bill.	21.64 bill.	275	275	0.0	7
DYR K.K.	Tokyo	MJ	19,899.0	17,714.0	12.0	151,551.6	135,283.1	3.45 bill.	26.27 bill.	221	216	2.0	1
Nihon Keizai Advertising	Tokyo	NA	16,164.7	12,974.5	25.0	115,455.0	99,774.9	2.80 bill.	20.01 bill	286	268	7.0	8
Tokyu Agency International	Tokyo	NA	15,399.2	15,813.9	-3.0	121,100.4	125,937.5	2.67 bill.	20.99 bill.	225	229	-2.0	1
Kyowa Advertising	Tokyo	NA	13,066.8	13,378.3	-2.0	94,034.7	96,307.2	2.27 bill.	16.30 bill.	198	208	-5.0	8
Standard Advertising	Tokyo/Osaka	NA	12,224.5	13,274.5	-8.0	99,803.7	108,364.9	2.12 bill.	17.30 bill.	148	149	-1.0	2
Grey Daiko Advertising	Tokyo	JV	8,572.7	9,432.3	-9.0	57,182.3	62,916.7	1.49 bill.	9.91 bill.	134	138	-3.0	1
K&L Inc.	Tokyo	NA	7,029.0	8,962.0	-22.0	46,880.0	59,777.0	1.22 bill.	8.13 bill.	149	126	18.0	1
Leo Burnett-Kyodo	Tokyo	MJ	5,016.4	3,533.1	42.0	33,444.0	23,555.0	869,545.0	5.80 bill.	54	45	20.0	1
DFS Dorland/Tokyo	Tokyo	MN	3,754.6	3,365.2	12.0	13,199.6	14,034.1	650,817.0	2.29 bill.	34	33	3.0	1
Cove-Ito Advertising	Tokyo	NA	2,422.0	1,528.0	59.0	6,922.0	4,327.0	420,000.0	1.20 bill.	28	25	12.0	2
Orikomi Bates	Tokyo	MN	2,028.2	1,724.3	18.0	18,674.0	13,620.9	351,567.0	3.24 bill.	29	26	12.0	1
Ketchum Advertising (Japan)	Tokyo	MJ	1,823.0	1,916.0	-5.0	17,133.9	17,999.3	316,083.0	2.97 bill.	25	26	-4.0	1
Meitsu BJK&E	Tokyo	MN	1,416.9	1,325.6	7.0	8,285.6	7,941.8	245,600.0	1.44 bill.	24	24	0.0	1
Dentsu S&H	Tokyo	MJ	1,059.0	911.0	16.0	5,382.4	4,629.9	183,574.4	932,986.4	12	11	1.0	1
Yomiko DFS International	Tokyo	MN	940.6	616.5	53.0	6,994.9	4,347.7	163,044.5	1.21 bill.	17	15	13.0	1
Ogilvy & Mather (Japan)	Tokyo	MJ	564.0	192.0	194.0	3,762.0	1,281.0	97,693.0	651,612.0	7	6	17.0	1
DMB&B Japan	Tokyo	MJ	408.0	276.0	48.0	2,902.0	1,685.0	70,822.0	503,000.0	3	4	-25.0	1
Foote, Cone & Belding (Japan)	Tokyo	MJ	344.4	149.9	130.0	2,297.2	999.6	59,700.0	398,200.0	10	6	67.0	1
SSC&B Lintas Worldwide Tokyo	Tokyo	MJ	N/A	N/A	N/A	40,613.8	N/A	N/A	7.04 bill.	51	31	65.0	1
KENYA													**Exchange rate: 0.0704 shilling**
McCann-Erickson (Kenya)	Nairobi	MJ	760.0	698.0	8.0	5,069.0	4,656.0	KSh10,795.0	KSh72,003.0	41	35	17.0	N/A
Ogilvy & Mather (Eastern Africa)	Nairobi	MJ	382.2	376.6	1.0	1,675.4	1,601.4	542,946.0	2,379.8	44	46	-4.0	1
KUWAIT													
Madco Kuwait	Kuwait	NA	330.0	440.0	-25.0	1,500.0	2,000.0	N/A	N/A	N/A	N/A	N/A	N/A
LEBANON													**Exchange rate: 0.0387 L pound**
H. & C. Leo Burnett	Beirut	MJ	2,759.0	882.4	213.0	18,394.3	5,903.3	Leb£71,292.0	Leb£475,304.0	79	79	0.0	2
Grant Advertising & Associates	Athens	MN	480.5	1,035.0	-54.0	2,058.4	6,902.0	12,416.8	53,187.8	N/A	N/A	N/A	3
Enterprise Middle East	Athens	MJ	297.0	328.0	-9.0	1,980.0	2,187.0	N/A	N/A	4	3	33.0	1
Madco Beirut	Beirut	NA	75.0	75.0	N/A	600.0	600.0	N/A	N/A	N/A	N/A	N/A	1
MALAWI													**Exchange rate: 0.5481 kwacha**
Graphic: Lintas Malawi	Blantyre	MN	94.9	148.5	N/A	514.1	798.0	Mk173.1	Mk937.9	20	23	-13.0	1
MALAYSIA													**Exchange rate: 0.4330 M dollar**
Ogilvy & Mather	Kuala Lumpur	MN	3,542.0	3,873.0	-9.0	23,625.0	25,831.0	M$8,180.0	M$54,560.0	132	132	0.0	1
PTM Thompson Advertising	Kuala Lumpur	MN	2,425.0	2,295.0	6.0	16,200.0	15,300.0	5,600.0	37,352.0	107	110	-3.0	1
KHK Needham Standard	Kuala Lumpur	MN	2,303.0	2,194.5	5.0	16,767.1	16,606.8	5,318.7	38,723.1	90	93	-3.0	1
AMC-Saatchi & Saatchi	Kuala Lumpur	MN	2,286.2	2,273.3	1.0	15,241.6	15,155.0	5,280.0	35,200.0	58	62	-6.0	1
Leo Burnett	Kuala Lumpur	MN	2,174.0	2,027.0	7.0	14,492.0	13,513.0	5,020.0	33,468.0	83	87	-5.0	1
SSC&B:Lintas	Kuala Lumpur	MN	1,881.3	2,128.9	-12.0	12,548.3	14,199.7	4,344.8	28,979.9	70	79	-11.0	2
Ted Bates (Malaysia)	Kuala Lumpur	MN	1,323.6	1,668.4	-21.0	9,879.4	12,136.1	3,056.7	22,816.3	63	71	-11.0	1
McCann-Erickson	Kuala Lumpur	MN	1,162.0	1,312.0	-11.0	7,751.0	8,751.0	2,684.0	17,902.0	35	47	-26.0	N/A
AP:Foote, Cone & Belding	Kuala Lumpur	MN	976.0	957.0	2.0	6,510.0	6,383.0	2,255.0	15,041.0	60	54	11.0	1
Wings Creative	Kuala Lumpur	MN	900.0	1,125.8	-20.0	6,000.0	7,570.0	2,100.0	14,000.0	60	65	-8.0	1
DYR	Kuala Lumpur	MN	889.0	1,285.0	-31.0	6,487.0	7,139.0	2,053.1	14,978.5	45	44	2.0	1
Bozell, Jacobs, Kenyon & Eckhardt	Selangor	MN	737.0	830.0	-11.0	3,353.0	5,535.0	1,702.1	7,743.8	47	48	-2.0	1
Francis Lim Zulkifli & Ayer	Kuala Lumpur	MN	418.3	388.1	8.0	2,790.2	1,688.9	966.1	6,443.9	28	26	8.0	1

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986 ($000; national currency)	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
Grant Advertising	Petaling Jaya	MN	355.2	375.0	-5.0	2,123.0	2,253.0	820.3	4,903.0	22	15	47.0	1
Grey Advertising	Kuala Lumpur	MN	229.9	N/A	N/A	1,532.8	N/A	531.0	3,540.0	N/A	N/A	N/A	1.0
Dancer Fitzgerald Sample	Kuala Lumpur	MN	385.4	65.0	N/A	1,147.5	303.1	890.0	2,650.0	21	36	-42.0	1
MEXICO													**Exchange rate: 0.00182 peso**
Publicidad Ferrer	Mexico City	NA	5,799.0	7,016.9	N/A	38,660.1	46,781.3	Ps3.19 bill.	Ps21.24 bill.	153	147	5.0	1
McCann-Erickson	Mexico City	MJ	5,268.0	5,353.2	N/A	35,138.0	35,705.6	2.89 bill.	19.31 bill.	242	231	5.0	N/A
J. Walter Thompson de Mexico	Mexico City	MJ	4,401.0	4,829.6	N/A	29,354.5	32,197.2	2.42 bill.	16.13 bill.	178	193	-8.0	1
Noble y Asociados	Mexico City	MJ	4,331.7	5,081.6	N/A	25,480.3	24,568.3	2.38 bill.	14.00 bill.	346	420	-18.0	1
Garcia Patto Internacional	Mexico City	NA	3,600.9	4,087.9	N/A	24,005.8	27,252.7	1.98 bill.	13.19 bill.	92	108	-15.0	1
Leo Burnett Co.	Mexico City	MJ	2,635.0	2,839.2	N/A	17,569.0	18,928.8	1.45 bill.	9.65 bill.	123	106	16.0	1
Panamericana Ogilvy & Mather	Mexico City	MN	2,217.0	3,011.2	N/A	14,622.2	20,084.5	1.22 bill.	8.03 bill.	125	132	-5.0	1
Young & Rubicam	Mexico City	MJ	1,973.0	2,049.0	N/A	13,160.0	13,652.4	1.08 bill.	7.23 bill.	106	97	9.0	1
Iconic	Mexico City	NE	1,585.2	1,860.0	N/A	10,556.0	12,276.0	871,000.0	5.80 bill.	62	85	-27.0	1
Paulino Romero	Mexico City	NA	1,584.7	2,000.2	N/A	10,439.5	13,064.6	870,725.0	5.74 bill.	104	103	1.0	1
Bozell, Jacobs, Kenyon & Eckhardt	Mexico City	MN	1,569.1	1,261.6	N/A	10,460.7	8,719.3	862,149.0	5.75 bill.	87	70	24.0	1
Dieste, Merino/BBDO	Mexico City	MN	1,313.2	1,567.0	N/A	9,100.3	11,692.7	721,544.0	5.00 bill.	48	50	-4.0	1
Scali, McCabe, Sloves de Mexico	Mexico City	MJ	1,152.2	613.8	N/A	7,681.4	4,091.9	633,086.0	4.22 bill.	68	41	66.0	1
SSC&B:Lintas Mexico	Mexico City	MJ	955.0	326.4	N/A	6,370.0	2,130.1	524,725.0	3.50 bill.	68	25	172.0	1
Publicidad D'Arcy	Mexico City	MJ	913.5	1,396.0	N/A	6,400.6	9,311.3	501,935.1	3.52 bill.	80	85	-6.0	1
Teran Publicidad	Mexico City	NA	642.2	755.1	N/A	4,355.3	5,479.6	352,835.0	2.39 bill.	58	65	-11.0	1
Grey Mexico	Mexico City	MJ	639.4	796.8	N/A	4,264.8	5,314.8	351,300.0	2.25 bill.	46	42	10.0	1
Foote, Cone & Belding	Mexico City	MJ	636.9	545.6	N/A	4,248.2	3,639.1	349,953.8	2.33 bill.	50	42	19.0	1
Montenegro/Saatchi & Saatchi Compton	Mexico City	MJ	631.8	572.0	N/A	4,211.9	3,813.0	347,143.0	2.31 bill.	28	30	-7.0	1
DDB Needham Worldwide	Mexico City	MJ	144.2	158.6	N/A	9,744.4	10,717.5	792,399.0	5.35 bill.	69	86	-20.0	1

With Mexican agencies, AA altered its procedure in determing an agency's "real growth" (applying 1986 exchange rates to 1985 returns) because it primarily shows the impact of inflation in that economy. Dollar figures for 1985 are based on the average annual exchange rate (.00372) for that year.

MOROCCO													**Exchange rate: 0.1260 dirhan**
Shem's Publicite	Casablanca	NA	363.8	285.9	27.0	3,717.0	3,049.2	DH2,887.0	DH29,500.0	24	27	-11.0	1
NAMIBIA													**Exchange rate: 0.4294 rand**
SSC&B: Lintas Nambia	Windhoek	MJ	13.3	11.5	16.0	805.2	711.3	R30.9	R187.5	1	1	0.0	1
NETHERLANDS													**Exchange rate: 0.3934 guilder**
FHV/BBDO Group	Amstelveen	MJ	17,809.2	14,469.5	23.0	118,728.1	96,461.7	Dfl 45,270.0	Dfl 301,800.0	N/A	N/A	N/A	N/A
PMSvW/Young & Rubicam	Amsterdam	MJ	15,085.3	13,781.6	9.0	100,697.0	91,996.0	38,346.0	255,971.8	204	186	10.0	1
O&M (Nederland)	Amsterdam	MJ	12,186.0	9,585.0	27.0	81,830.0	63,927.5	30,976.0	208,007.0	217	179	21.0	o
Saatchi & Saatchi Compton	Amsterdam	MJ	8,613.5	7,488.4	15.0	57,423.4	49,961.8	21,895.0	145,967.0	110	75	47.0	4
PPGH/Moussault	Amsterdam	MN	8,505.7	7,355.4	16.0	56,733.0	49,060.5	21,621.0	144,212.0	87	80	9.0	N/A
Prad Alliance	Amsterdam	MJ	7,400.0	6,800.0	9.0	49,200.0	45,200.0	18,700.0	125,000.0	65	67	-3.0	1
Lintas Netherlands	Amsterdam	MJ	7,395.0	7,293.9	1.0	54,986.0	52,553.9	18,797.5	139,771.1	113	113	0.0	1
McCann-Erickson (Nederland)	Amsterdam	MJ	6,977.0	5,933.0	18.0	46,537.0	39,573.0	17,736.0	118,299.0	103	103	0.0	N/A
Noordervliet & Winninghoff/ Leo Burnett	Amsterdam	MJ	6,267.0	6,162.0	2.0	41,779.0	41,031.0	15,930.0	106,200.0	114	91	25.0	1
ARA B.V.	Rotterdam	MJ	6,242.5	5,951.7	5.0	41,615.4	39,678.3	15,868.0	105,784.0	70	60	17.0	1
J. Walter Thompson Co.	Amsterdam	MJ	5,376.2	5,972.2	-10.0	35,858.9	39,816.7	13,665.9	91,151.3	95	97	-2.0	2
Geudeker Oerlemans & Needham	Amstelveen	MN	5,310.0	4,023.0	32.0	35,424.0	26,836.0	13,500.0	90,045.0	67	55	22.0	2
DMM/Result	Amsterdam	MJ	4,621.0	4,609.0	0.0	30,824.0	30,740.0	11,747.0	78,352.0	70	70	0.0	1
Publicis	Amsterdam	MJ	4,412.0	4,220.0	5.0	29,416.0	28,133.0	11,216.0	74,773.0	73	76	-4.0	2
HCM Netherlands	The Hague	MJ	4,248.7	5,310.9	-20.0	28,324.8	35,406.0	10,800.0	72,000.0	68	81	-16.0	2
Allick/Bates B.V.	Amsterdam	MJ	4,242.0	1,677.0	153.0	31,141.0	12,346.0	10,783.0	79,158.0	77	33	133.0	1
TBWA	Amsterdam	MJ	4,208.0	2,921.8	44.0	28,298.0	23,316.4	10,696.0	71,932.0	51	34	50.0	1
H.V.R.	Amstelveen	MJ	3,780.0	3,380.0	12.0	25,180.0	22,540.0	9,600.0	64,000.0	N/A	50	N/A	N/A
B&B Advertising	Amsterdam	MJ	3,600.1	3,589.1	0.0	24,000.6	23,927.6	9,151.2	61,008.2	55	55	0.0	1
Doyle Dane Bernbach	Amsterdam	MJ	3,551.4	3,006.2	18.0	23,687.9	20,051.4	9,027.5	60,213.2	46	42	10.0	2
Grey Advertising	Amsterdam	MJ	3,104.5	2,027.9	53.0	20,689.6	13,523.8	7,891.4	52,591.8	54	42	29.0	1
FCB Netherlands	Amsterdam	MJ	3,030.4	3,986.3	-24.0	20,212.5	26,588.7	7,703.0	51,379.0	51	60	-15.0	1
Ayer Group/Netherlands	Amsterdam	MJ	2,706.2	2,804.1	-3.0	18,040.9	18,568.5	6,879.0	45,859.0	49	49	0.0	4
GGK Amsterdam	Amsterdam	MJ	2,507.0	2,478.5	1.0	16,720.0	16,523.0	6,372.0	42,501.0	38	30	27.0	1
Baas en van Haastrecht	Rotterdam	NA	2,384.0	2,254.2	6.0	15,893.4	15,027.9	6,060.0	40,400.0	37	37	0.0	1
Van Jaarsfeld/Fontein	Eindhoven	MJ	1,622.8	1,298.2	25.0	10,818.5	8,654.8	4,125.0	27,500.0	29	22	32.0	1
Schulte & Partners	Lochem	NA	1,534.3	1,416.2	8.0	10,267.7	9,559.6	3,900.0	26,100.0	24	22	9.0	1
Hettinga, De Lang, Possel, De Boers Reclamebureau	Amsterdam	NA	1,369.0	1,180.2	16.0	9,126.9	7,868.0	3,480.0	23,200.0	22	13	69.0	1
Klein/Theeuwes/Vandermeulen	Amsterdam	MJ	1,328.0	1,002.0	22.0	8,850.0	7,280.0	3,375.0	22,500.0	18	16	13.0	1
DFS Dorland	Amsterdam	MJ	1,298.2	2,242.4	-42.0	8,654.8	14,949.2	3,300.0	22,000.0	23	50	-54.0	1
Smits & Palm Advertising	Amsterdam	NA	1,298.2	1,125.1	15.0	8,222.1	7,010.4	3,300.0	20,900.0	15	13	15.0	1
Lowe Marschalk Postma & Partners	Amsterdam	MJ	1,279.0	1,184.5	8.0	8,530.0	7,900.7	3,251.0	21,684.0	20	16	25.0	1
RSCG van Diggele, Janzen, Schoenmaker	Amsterdam	MJ	1,140.0	872.0	31.0	7,868.0	5,743.0	2,900.0	20,000.0	20	12	67.0	1
Continental Advertising	The Hague	NA	629.4	550.8	14.0	6,294.4	5,901.0	1,600.0	16,000.0	13	13	0.0	2
Bode Bosman & Kompagnons	Amsterdam	NA	569.6	567.3	0.0	6,294.0	6,294.0	1,448.0	16,000.0	N/A	N/A	N/A	N/A

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986 ($000; national currency)	Employes 1986	Employes 1985	Employes Percent change	Number offices
NEW ZEALAND													**Exchange rate: 0.5252 NZ dollar**
Colenso Communications	Auckland	MN	5,765.1	5,009.9	15.0	28,825.6	25,049.4	NZ$10,977.0	NZ$54,885.0	N/A	N/A	N/A	2
MDA Mackay King Advertising	Auckland	NE	5,142.9	3,430.0	50.0	21,428.9	14,295.4	9,792.3	40,801.3	73	71	3.0	2
USP Needham New Zealand	Wellington	MJ	4,549.1	4,159.5	9.0	23,292.1	21,313.0	8,661.6	44,349.1	84	92	-9.0	3
Ted Bates New Zealand	Wellington	MN	4,400.0	3,400.0	29.0	22,000.0	17,000.0	8,400.0	42,000.0	74	74	0.0	3
DMB&B	Auckland	MJ	3,805.0	3,059.0	24.0	20,013.0	16,116.0	7,244.0	38,106.0	75	84	-11.0	3
Saatchi & Saatchi Compton	Wellington	MJ	3,768.8	3,520.4	7.0	18,884.2	17,179.9	7,176.0	35,880.0	77	80	-4.0	3
Haines Advertising	Auckland	NA	3,217.1	2,743.9	17.0	21,447.2	18,292.4	6,125.4	40,836.3	105	90	17.0	5
Dobbs-Wiggins McCann-Erickson	Auckland	MJ	3,190.0	2,688.0	19.0	21,277.0	17,929.0	6,073.0	40,507.0	73	82	-11.0	N/A
Ogilvy & Mather	Wellington	MJ	3,132.5	2,208.6	41.8	20,893.9	14,731.1	5,964.4	39,782.7	95	72	32.0	7
Leo Burnett	Auckland	MJ	2,436.9	1,575.6	55.0	12,184.6	9,453.6	4,640.0	23,200.0	40	50	-20.0	2
Rialto Advertising	Auckland	MN	2,413.3	1,451.1	66.0	12,066.5	7,255.6	4,595.0	22,975.0	N/A	N/A	N/A	2
SSC&B:Lintas	Wellington	MJ	1,809.0	1,271.0	42.0	8,867.0	6,422.0	3,445.0	16,883.0	46	40	15.0	2
Ward & Grey Advertising	Auckland	MN	986.0	927.6	6.0	4,695.0	4,417.0	1,877.3	8,939.5	11	11	0.0	1
Mainstream/FCB	Auckland	MJ	965.4	817.0	18.0	6,439.1	5,449.4	1,838.1	12,260.3	23	20	15.0	1
Hutcheson Knowles Marinkovich	Auckland	MN	880.8	529.4	66.0	4,403.8	2,646.0	1,677.0	8,385.0	N/A	N/A	N/A	1
Andrew & Young	Auckland	NA	336.1	159.4	111.0	1,680.3	664.3	639.9	3,199.3	9	9	0.0	1
NORWAY													**Exchange rate: 0.1343 kroner**
Ted Bates	Oslo	MJ	12,522.0	12,910.5	-3.0	74,342.4	86,070.0	NKr93,237.0	NKr553,555.0	232	229	1.0	1
ScanPartner Norge	Oslo	NA	6,694.9	4,885.2	37.0	44,632.5	32,568.3	49,850.1	332,334.5	202	152	33.0	16
Scaneco-Young & Rubicam	Oslo	MJ	5,738.0	3,990.0	44.0	38,272.0	26,612.0	42,748.0	284,973.3	114	70	63.0	N/A
Ogilvy & Mather Norway	Oslo	MJ	4,427.4	4,190.6	6.0	28,726.8	27,385.0	32,966.6	213,900.1	65	65	0.0	1
B&B A/S	Oslo	MJ	4,418.0	4,279.0	3.0	19,917.0	19,469.0	32,900.0	148,300.0	80	86	-7.0	2
B&L Creative Service	Oslo	MJ	2,917.0	2,858.0	2.0	19,457.2	18,443.0	21,721.0	144,879.0	44	45	-2.0	2
SSC&B: Lintas Norway	Oslo	MN	2,453.9	1,400.2	75.0	34,404.3	25,664.2	18,272.0	256,175.0	76	75	1.0	3
Reklamens Hus/McCann	Oslo	MJ	2,428.0	2,355.0	3.0	16,195.0	15,708.0	18,082.0	120,607.0	35	44	-20.0	N/A
Ottesen Bates	Stavanger	MN	2,149.0	2,015.0	7.0	14,332.0	15,509.0	16,000.0	106,720.0	32	32	0.0	1
Foote, Cone & Belding A/S	Oslo	MN	1,634.0	1,376.0	19.0	10,896.0	9,181.0	12,164.0	81,134.0	22	22	0.0	1
Anderson & Lembke	Oslo	MJ	1,577.0	1,175.1	7.0	9,466.0	7,632.0	11,742.0	70,488.0	23	20	5.0	1
Grey A/S	Oslo	MN	1,385.2	1,073.2	29.0	9,240.0	7,158.2	10,314.0	68,794.4	30	20	50.0	2
Schjaerven/J.W.T	Oslo	NE	1,322.9	1,281.0	3.0	8,823.6	8,540.7	9,850.2	65,700.6	22	21	5.0	1
Jenssen & Borkenhagen	Oslo	NA	1,281.9	958.0	34.0	18,667.7	13,698.6	9,545.0	139,000.0	23	21	10.0	1
Bates Bergen	Bergen	MJ	1,250.6	1,341.3	-7.0	8,342.0	10,510.0	9,312.0	62,111.0	23	30	-23.0	1
Ekko Bates A/S	Trondheim	MJ	995.3	986.0	1.0	6,639.0	6,408.0	7,411.0	49,431.0	20	19	5.0	1
B.J. Kverneland A/S	Oslo	NA	619.9	463.3	34.0	5,300.0	3,200.0	4,616.1	38,000.0	14	16	-13.0	1
Ervaco Norway	Oslo	NA	402.9	358.2	12.0	1,208.7	1,194.0	3,000.0	9,000.0	N/A	N/A	N/A	N/A
PAKISTAN													**Exchange rate: 0.0611 rupee**
R: Lintas (Private)	Karachi	NE	1,001.1	797.0	26.0	6,674.0	5,312.0	R16,388.0	R109,253.0	71	66	8.0	1
Orient Advertisers	Karachi	NA	733.2	576.2	27.0	4,888.0	3,841.5	12,000.0	80,000.0	150	116	29.0	5
Asiatic Advertising	Karachi	NA	439.9	353.8	24.0	2,932.8	2,358.5	7,200.0	48,000.0	95	82	16.0	1
Prestige Advertising	Karachi	NA	286.0	260.0	10.0	1,907.8	1,734.4	4,681.4	31,224.9	51	52	-2.0	2
G.H. Thaver & Co.	Karachi	NA	146.9	117.2	25.0	1,111.0	887.4	2,404.2	18,183.5	19	17	12.0	1
ABM Advertising	Karachi	NA	87.1	77.9	12.0	580.5	519.4	1,425.0	9,500.0	20	17	18.0	1
PANAMA													**Exchange rate: 1.00 dollar**
Campagnani, Aleman Publicidad	Panama City	NE	1,255.0	1,203.0	4.0	5,300.0	5,623.0	$1,255.0	$5,300.0	47	50	-6.0	N/A
McCann-Erickson de Panama	Panama City	MJ	969.0	1,114.0	-13.0	6,463.0	7,430.0	969.9	6,463.0	36	38	-5.0	N/A
APCU de Panama	Panama City	NA	250.0	225.0	11.0	1,665.0	1,500.0	250.0	1,665.0	16	15	7.0	1
PARAGUAY													**Exchange rate: 0.00162 guarani**
J. Walter Thompson	Asuncion	MJ	96.2	87.1	10.0	641.7	581.0	G59,382.5	G396,081.3	10	9	11.0	1
McCann-Erickson (Paraguay)	Asuncion	MJ	27.0	23.0	17.0	180.0	153.0	16,605.0	110,755.0	0	0	0.0	N/A
PERU													**Exchange rate: 0.071 inti**
J. Walter Thompson	Lima	MJ	1,328.6	615.4	N/A	8,861.9	4,103.0	In18,713.0	In124,815.7	89	87	2.0	1
McCann-Erickson (Peru)	Lima	MJ	1,088.0	522.0	N/A	7,257.0	3,482.0	15,317.0	102,164.0	69	75	-8.0	N/A
CNP & Grey	Lima	ND	594.6	328.6	N/A	3,963.9	2,190.4	8,374.3	55,829.2	74	70	6.0	1
Publicistas Asociados	Lima	NE	564.8	954.0	N/A	3,053.0	6,360.0	7,955.0	43,000.0	48	51	-6.0	1
PHILIPPINES													**Exchange rate: 0.0511 peso**
J. Walter Thompson	Manila	MJ	2,459.7	2,314.0	6.0	16,406.0	15,434.5	Ps48,134.5	Ps321,057.4	208	195	7.0	1
McCann-Erickson	Manila	MJ	1,923.0	1,329.0	45.0	12,826.0	8,864.0	37,635.0	251,025.0	162	128	27.0	N/A
Ace-Compton Advertising	Manila	MJ	1,515.7	1,268.1	20.0	10,287.2	8,458.0	29,660.5	201,315.7	144	119	21.0	1
Advertising & Marketing Associates	Manila	NE	1,507.0	1,097.3	37.0	10,286.0	8,127.0	29,492.1	201,291.4	188	190	-1.0	2
Philippine Advertising Counselors	Manila	NE	1,272.4	1,420.0	-10.0	8,500.0	9,450.0	24,900.0	166,300.0	150	175	-14.0	N/A
Bates-Alcantara	Manila	MN	1,129.0	1,446.0	-22.0	8,034.0	10,518.0	22,091.0	157,220.0	115	133	-14.0	1
Basic/Foote, Cone & Belding	Manila	MN	1,034.0	1,042.1	-1.0	6,897.0	6,950.5	20,237.0	134,981.0	154	132	17.0	1
SSC&B:Lintas Philippines	Manila	MN	926.2	665.9	39.0	6,212.4	4,232.9	18,125.0	121,574.2	81	63	29.0	1
Hemisphere-Leo Burnett	Manila	MJ	901.0	590.4	53.0	6,004.0	3,936.0	17,623.0	117,493.0	92	69	33.0	1
Great Wall Advertising	Manila	NA	405.5	326.6	24.0	2,555.0	2,238.2	7,935.4	50,000.0	57	56	2.0	1
Admakers	Quezon City	NA	342.2	273.6	25.0	2,282.9	1,824.3	6,701.1	44,674.3	47	40	18.0	1
Aspac & Grey	Manila	MN	227.4	143.7	58.0	1,516.5	958.2	4,449.4	29,677.7	38	32	19.0	1
Matrix Communications	Manila	MN	27.5	10.4	164.0	183.1	69.1	537.2	3,583.4	7	5	40.0	1

Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986	Billings 1986	Employes 1986	Employes 1985	Employes Percent change	Number offices
								($000; national currency)					
PORTUGAL													**Exchange rate: 0.006683 escudo**
McCann-Erickson/Hora Publicidade	Lisbon	MJ	2,737.0	2,011.0	36.0	18,256.0	13,413.0	Esc409,609.0	Esc2.73 bill.	90	78	15.0	N/A
Ciesa-NCK Portugal	Lisbon	MJ	2,127.4	1,398.3	52.0	14,189.9	9,326.9	318,334.0	2.12 bill.	82	78	5.0	1
Lintas Lisbon	Lisbon	MJ	2,021.7	1,232.0	64.0	13,369.0	8,792.9	302,510.0	2.00 bill.	61	54	13.0	1
J. Walter Thompson Publicidade	Lisbon	MJ	1,606.0	1,116.2	44.0	10,707.5	7,441.6	240,318.0	1.60 bill.	75	72	4.0	1
FCB Portugal	Lisbon	MJ	1,458.9	928.0	57.0	9,730.8	6,190.1	218,229.0	1.46 bill.	40	38	5.0	1
Publicis Lisboa	Lisbon	MJ	1,236.4	941.0	31.0	8,247.0	6,269.0	185,000.0	1.23 bill.	74	66	12.0	1
Team	Lisbon	NA	1,202.9	700.5	72.0	8,019.6	4,670.0	180,000.0	1.20 bill.	58	55	5.0	2
Sistema	Lisbon	MN	1,102.7	853.1	29.0	7,351.3	5,689.6	165,000.0	1.10 bill.	64	59	8.0	3
Boom & Bates	Lisbon	MN	747.6	305.0	145.0	2,576.8	1,238.5	111,869.0	385,571.0	21	20	5.0	1
Ogilvy & Mather Portugal	Lisbon	MJ	676.1	278.6	143.0	3,167.7	1,879.6	101,160.2	473,998.8	39	29	34.0	1
Unitros Portugal	Lisbon	MJ	594.1	398.8	49.0	3,958.1	2,364.0	88,900.0	592,263.0	23	25	-8.0	1
DDB Needham Worldwide & Guerreiro	Lisbon	MJ	499.3	247.2	102.0	2,290.1	1,373.3	74,718.5	342,672.8	21	18	17.0	1
Antena Publicidade	Lisbon	NE	477.4	252.6	89.0	3,182.8	1,684.0	71,436.9	476,246.2	32	23	39.0	1
Timing Alliance	Lisbon	MJ	351.3	134.8	161.0	1,194.9	582.5	52,560.0	178,800.0	15	13	15.0	1
PUERTO RICO													**Exchange rate: 1.00 dollar**
Badillo/Saatchi & Saatchi Compton	San Juan	MJ	10,340.0	9,400.0	10.0	69,000.0	63,000.0	$10,340.0	$69,000.0	185	150	23.0	2
Young & Rubicam Puerto Rico	San Juan	MJ	5,127.0	4,245.0	21.0	34,197.0	28,314.0	5,127.0	34,197.0	82	77	6.0	N/A
Marti, Flores, Prieto & Wachtel	San Juan	MN	4,669.0	4,804.2	-3.0	31,142.2	32,044.0	4,669.0	31,142.2	86	87	-1.0	1
J.R. Marquina & Associates	Hato Rey	NE	3,930.0	3,690.0	7.0	26,200.0	24,600.0	3,930.0	26,200.0	78	65	20.0	1
FCB Inc.	Isla Verde	MJ	2,946.0	3,332.0	-12.0	19,650.0	22,225.0	2,946.0	19,650.0	61	83	-27.0	2
McCann-Erickson (Puerto Rico)	San Juan	MJ	2,615.0	2,336.0	12.0	17,442.0	15,581.0	2,615.0	17,442.0	55	51	8.0	N/A
BBDO Puerto Rico	San Juan	MJ	2,015.8	1,736.6	16.0	13,400.0	11,600.0	2,015.8	13,400.0	38	33	15.0	1
Leo Burnett Inc.	San Juan	MJ	2,015.0	1,857.0	9.0	13,434.0	12,381.0	2,015.0	13,434.0	43	40	8.0	1
CPV/Bozell, Jacobs, Kenyon & Eckhardt	Puerto Rico	MJ	750.0	330.0	127.0	5,000.0	2,224.0	750.0	5,000.0	18	19	-5.0	1
SAUDI ARABIA													**Exchange rate: 0.2713 riyal**
Madco Saudi Arabia	Jeddah	NA	618.0	494.0	25.0	3,500.0	2,800.0	R2,277.9	R12,901.0	N/A	N/A	N/A	N/A
DMB&B	Jeddah	MJ	19.1	N/A	N/A	126.2	N/A	70.3	465.2	1	N/A	N/A	1
SINGAPORE													**Exchange rate: 0.4638 S dollar**
Ogilvy & Mather	Singapore	MJ	2,422.4	2,453.8	-1.0	16,023.7	16,366.7	S$5,222.8	S$34,548.8	97	89	9.0	1
McCann-Erickson	Singapore	MJ	1,903.0	1,841.0	3.0	12,693.0	12,279.0	4,104.0	27,374.0	64	55	16.0	N/A
Leo Burnett	Singapore	MJ	1,693.0	1,758.0	-4.0	11,286.0	11,719.0	3,650.0	24,335.0	55	59	-6.0	1
DYR	Singapore	MJ	1,551.0	1,414.0	10.0	8,600.0	8,545.0	3,343.8	18,854.2	44	41	7.0	1
Batey Ads	Singapore	NA	1,530.5	1,345.0	14.0	11,363.1	9,739.8	3,300.0	24,500.0	N/A	N/A	N/A	N/A
Bozell, Jacobs, Kenyon & Eckhardt	Singapore	MJ	1,484.0	1,514.3	-2.0	9,865.0	10,481.9	3,200.0	21,270.0	57	62	-8.0	N/A
J. Walter Thompson	Singapore	MJ	1,205.6	1,139.0	6.0	8,041.1	7,596.8	2,599.3	17,337.5	47	43	9.0	1
Adcom & Grey	Singapore	MN	1,102.0	1,156.6	-5.0	7,350.6	7,714.7	2,376.1	15,848.6	40	42	-5.0	1
SSC&B: Lintas S.E.Asia	Singapore	MJ	1,060.0	965.0	10.0	7,575.0	7,124.0	2,285.0	16,333.0	34	32	6.0	1
Saatchi & Saatchi Compton	Singapore	MJ	952.3	850.0	12.0	6,349.0	5,459.9	2,053.4	13,689.0	40	36	11.0	1
Ted Bates	Singapore	MJ	900.0	935.6	-4.0	5,058.5	6,077.8	1,940.4	10,906.7	49	50	-2.0	1
BBDO Advertising	Singapore	MJ	608.7	1,152.5	-47.0	2,541.7	4,284.8	1,312.3	5,480.2	35	51	-31.0	1
Needham Standard International	Singapore	MJ	592.3	764.3	-29.0	3,950.5	4,982.7	1,277.0	8,517.6	23	29	-21.0	1
Angie Mui Ayer	Singapore	NE	474.8	N/A	N/A	3,322.2	N/A	1,023.7	7,162.9	N/A	N/A	N/A	N/A
Doyle Dane Bernbach Advertising	Singapore	MJ	312.1	446.6	-30.0	2,082.0	2,979.1	673.0	4,488.9	7	17	-59.0	1
Tom Tan Associates	Singapore	NA	285.5	386.8	-26.0	2,026.8	2,254.1	615.6	4,370.0	19	19	0.0	3
DMB&B	Singapore	MJ	181.0	222.0	-18.0	1,210.0	1,836.0	391.0	2,608.0	20	14	43.0	1
CR & Grey	Singapore	MN	95.1	N/A	N/A	634.2	N/A	205.0	1,367.4	2	N/A	N/A	1
Chuo Senko Advertising	Singapore	NA	69.6	87.2	-20.0	532.0	690.0	150.0	1,146.0	6	4	50.0	1
SOUTH AFRICA													**Exchange rate: 0.4284 rand**
Grey Phillips	Johannesburg	MN	8,229.0	7,719.7	7.0	54,887.2	51,490.2	R19,208.6	R128,121.4	256	253	1.0	9
Bates Wells	Johannesburg	NE	7,255.0	6,237.0	16.0	34,162.0	33,272.5	16,936.0	79,744.0	314	305	3.0	12
Young & Rubicam South Africa	Capetown	MJ	6,983.0	5,691.0	23.0	46,577.0	38,104.0	16,240.0	108,710.7	348	344	1.0	N/A
Ogilvy & Mather, Rightford Searle-Tripp & Makin	Johannesburg	MN	6,210.9	5,450.5	14.0	33,924.1	29,336.4	14,498.0	79,188.0	151	140	8.0	2
Lindsay Smithers-FCB Holdings	Sandton	MN	5,341.0	4,873.0	10.0	35,627.0	32,503.0	12,468.0	83,162.0	238	252	-6.0	4
McCann-Erickson South Africa	Johannesburg	MJ	4,819.0	5,206.0	-7.0	32,143.0	34,724.0	11,249.0	75,031.0	186	209	-11.0	N/A
Klerck & McCormac	Johannesburg	NE	4,304.7	4,403.3	6.0	25,265.1	24,502.9	10,048.4	58,975.6	202	194	4.0	8
J. Walter Thompson South Africa	Johannesburg	MN	3,523.4	3,279.8	7.0	23,500.7	21,866.3	8,224.4	54,857.0	136	142	-4.0	2
SSC&B: Lintas South Africa	Johannesburg	MJ	3,358.9	2,993.5	12.0	20,806.3	18,635.5	7,840.5	48,567.4	139	141	-1.0	3
DMB&B S.A.	Johannesburg	MJ	2,494.0	2,227.0	12.0	15,167.0	13,535.0	5,822.0	35,405.0	87	101	-14.0	2
Venture Freedman Rossi/BBDO	Johannesburg	NE	2,226.0	2,942.0	-24.0	11,549.0	16,216.0	5,196.0	26,958.0	94	141	-33.0	1
Partnership in Advertising	Johannesburg	MN	1,624.5	1,350.8	20.0	10,835.5	9,009.8	3,792.0	25,293.0	38	41	-7.0	1
Ogilvy & Mather Direct	Johannesburg	MN	897.5	722.7	24.0	2,796.2	3,298.7	2,005.0	6,527.0	31	28	11.0	2
Wilsenach	Johannesburg	NE	775.1	519.7	49.0	3,875.5	2,598.1	1,809.3	9,046.4	38	34	12.0	1
Meridian Advertising	Johannesburg	MN	436.0	179.1	143.0	2,274.0	978.5	1,017.0	5,307.0	20	13	54.0	1
Graphic Advertising Services	Johannesburg	NE	169.0	179.1	-6.0	710.0	794.0	394.0	1,657.0	8	8	0.0	1
Venture Marketing & Advertising	Capetown	NE	156.4	137.6	14.0	715.0	573.0	365.0	1,670.0	13	14	-7.0	1
Venture CBD	Durban	NE	51.4	24.0	114.0	170.0	106.0	120.0	397.0	18	15	20.0	1

Notes to individual listings

GENERAL NOTES
Young & Rubicam does not report billings. Figures listed for Y&R billings throughout the charts are AA estimates.
The Ball Partnership with offices in Australia, Hong Kong, Malaysia, Singapore and Thailand, acquired by WCRS Group PLC, London, in February, formerly was part of Ogilvy & Mather Worldwide. Figures arrived too late for inclusion in the charts and are listed in the respective country footnotes.

ARGENTINA
David Ratto minority owned by BBDO **Ortiz Scopesi y Cia.** minority owned by Ogilvy & Mather **Gowland Publicidad** Gross income for 1986 AA estimate **Lautrec S.A.** Affiliated with DFS Dorland **Pragma/FCB** 20% owned by FCB Communications **Cicero/Ted Bates Publicidad** Since agency did not submit figures, data are AA estimates **Johnson/B&B** 5% owned by DMB&B **Colonnese y Asociados** Gross income for 1986 AA estimate

AUSTRALIA
George Patterson 80% owned by Ted Bates Worldwide **Clemenger BBDO** 45% owned by BBDO **Mojo MDA** figures include Melbourne, Brisbane and Perth offices, interests in Hobart, Launceston, Adelaide and Darwin. Mojo and the Monahan Dayman Adams group merged in July last year **Young & Rubicam Australia** figures include Burson-Marsteller **USP Needham Australia** 50% owned by DDB Needham **Mattingly Group** majority owned by Mojo MDA **Neville Jeffress Advertising** 1986 gross income figures AA estimates **Magnus Nankervis & Curl/DDB** 49% owned by DDB Needham Worldwide **Connaghan & May Ayer** 49% owned by N W Ayer **William Roberts** majority owned by Mojo MDA in 1985 **Forbes Macfie Hansen** gross income figures for both years AA estimates **Dancer Fitzgerald Sample Australia** owned 49% by DFS Dorland **The Campaign Palace** 49% owned by Saatchi & Saatchi Compton **Ball Partnership** Majority owned by the WCRS Group, London. **Hertz Walpole** 48% owned by Lowe Marschalk Worldwide **Garland Stewart & Roache** part of The Ball Partnership. Gross income figures for 1986 AA estimates **Tarrant Haysom & Manzie** gross income figure for 1986 AA estimate **Harris Robinson Courtenay** 80% owned by BBDO

AUSTRIA
Werbeagentur Wirz 5% owned by Wirz Holding, Zurich **Ogilvy & Mather** includes figures for O&M Direct and O&M PR **Die Sieber** associated with Saatchi & Saatchi Compton **Dr. Puttner & Ted Bates** 75% owned by Ted Bates **Grey Austria** includes figures for ARC, Vienna **Gould Cargill** majority owned by Grey Advertising **RSCG-Jasch & Schramm** 51% owned by RSC&G, Paris **Marketing Studio/FCB** 32% owned by FCB Communications **Target Werbung** majority owned by J. Walter Thompson, uses JWT staff

BAHRAIN
Fortune Promoseven Network offices in Saudi Arabia, Kuwait, Dubai, Egypt, Lebanon, the U.K. and France

BELGIUM
HHD Ogilvy & Mather billings figures for 1986 and 1985 not supplied **Young & Rubicam** figures include Wunderman and Burson-Marsteller **VVL/BBDO** 74% owned by BBDO **M&CW** 33.3% owned by Bozell, Jacobs, Kenyon & Eckhardt **Partner** associated with Saatchi & Saatchi Compton **Garbarski RSCG** 51% owned by RSC&G, Paris **Moors/Bronselaer** associated with BBDO

BRAZIL
MPM Propaganda Affiliated with Grey Advertising **Salles/Inter-Americana** Affiliated with N W Ayer **Denison Propaganda** affiliated with Ted Bates Worldwide **Norton Publicidade** affiliated with Bozell, Jacobs, Kenyon & Eckhardt **Justus Young & Rubicam Brazil** includes figures for Cato Johnson and Burson-Marsteller **SGB Publicidade e Promocoes** associated with Saatchi & Saatchi Compton **Expressao** is the house agency for Brazilian airline Varig **Esquire Publicidade** affiliated with DFS Dorland **PPR-Profissionais de Propaganda Reunidos** majority-owned by J. Walter Thompson Co.

BRITAIN
Saatchi & Saatchi U.K. includes Harrison Cowley, RPG, Acme, SPA, Halls **McCann-Erickson U.K.** includes Harrison Advertising, Advertising Ltd., Photo-Video, Intercompany Administrative & Computing Services, Universal McCann, Direct, M/E Communications and M/E Royds **Young & Rubicam Holdings** includes Wunderman, Cato Johnson, Sudler & Hennessey and Burson-Marsteller **Charles Barker Group** minority owned by N W Ayer, includes Ayer Barker figures (with 1986 billings of $50,580.4), Charles Barker City, Charles Barker Human Resources, Charles Barker Black & Gross and Charles Barker Scotland **Lowe Howard-Spink Marschalk** part of Lowe Marschalk Worldwide **Lintas** includes SSC&B:Lintas Overseas, Presight and Spectrum **Allen Brady & Marsh** acquired early 1986 by Lowe Howard-Spink & Bell **Colman RSCG** owned 55% by Paris-based RSC&G **HCM Horner Collis & Kirvan** owned 56% by HCM International **ARC Advertising** 100% owned by Grey Advertising **Moxon, Dolphin & Kerby** majority-owned by Saatchi & Saatchi Compton **White Bull Holmes** recruitment agency of Alliance International Group **LansdownEuro** 100% owned by J. Walter Thompson Co. **Slaymaker Cowley White/BDG** 35% owned by Bozell, Jacobs, Kenyon & Eckhardt **Delaney Fletcher Delaney** gross income figures for 1986 and 1985 AA estimates **Garratt Baulcombe** 90% owned by FCB Communications **F. John French Agency** '85 gross income and billings AA estimates **St. James Corporate Communications** financial communications agency of Alliance International Group **Leagas Delaney Partnership** 76% owned by Abbott Mead Vickers/SMS **Primary Contact** owned 100% by Ogilvy & Mather **Butler, Borg & LSW** 35% owned by Bozell, Jacobs Kenyon & Eckhardt **Mallett-McCormick** non-equity affiliation with Publicis **FCB Cosby Paul** fully owned by FCB Communications, opened in 1986

CANADA
Vickers & Benson Includes data for Warwick, Goodman & Associates, Toronto, and Leveille Vickers & Benson, Montreal **Young & Rubicam** includes figures for Wunderman and Burson-Marsteller **Baker Lovick** minority owned by BBDO Worldwide **Ronalds-Reynolds** affiliated with DFS Dorland Worldwide **Grant Tandy** majority owned by BBDO Worldwide **DDB Needham Worldwide** Merger of DDB and Needham Harper of Canada took place in 1987 **PNMD** 39.9% owned by Baker Lovick, part of BBDO **Enterprise Advertising**, majority owned by J. Walter Thompson Co. **Lowe Mar-**

(Continued on Page 75)

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Agency	City		Gross income 1986	Gross income 1985 ($000)	Percent change income	Billings 1986	Billings 1985 ($000)	Gross income 1986 ($000; national currency)	Billings 1986	Employes 1986	Employes 1985	Percent change	Number offices
SOUTH KOREA													**Exchange rate: 0.001131 won**
Korea First Advertising	Seoul	NA	16,301.3	12,724.6	31.0	98,082.6	77,518.3	W14.41 bill.	W86.72 bill.	325	300	8.0	1
Oricom Inc.	Seoul	NA	15,989.0	11,999.1	33.0	80,883.0	64,860.3	14.14 bill.	71.51 bill.	362	354	2.0	1
Daehong Advertising	Seoul	NE	9,390.7	5,969.4	57.0	69,104.0	49,490.3	8.30 bill.	61.10 bill.	177	153	16.0	1
Korad International	Seoul	NE	5,621.3	4,256.9	32.0	39,698.1	34,721.7	4.97 bill.	35.10 bill.	160	120	33.0	2
LG Ad	Seoul	NE	5,395.0	4,976.0	8.0	56,978.0	49,255.0	4.77 bill.	50.38 bill.	194	185	5.0	1
Union Advertising	Seoul	NE	5,100.0	4,320.0	18.0	51,060.0	41,440.0	4.51 bill.	43.70 bill.	173	168	3.0	1
Dongbang Advertising	Seoul	NE	3,419.0	2,951.9	16.0	34,156.2	29,496.5	3.02 bill.	30.20 bill.	N/A	95.0	N/A	1
Samhee Advertising	Seoul	NE	2,148.9	964.7	123.0	21,489.0	9,647.4	1.90 bill.	19.0 bill.	N/A	55	N/A	1
Diamond Avertising	Seoul	NE	1,990.5	1,391.1	43.0	19,875.1	13,895.5	1.76 bill.	1.23 bill.	99	49	102.0	1
Seoul Agency	Seoul	NE	1,888.7	1,388.2	36.0	18,887.7	18,684.1	1.67 bill.	16.70 bill.	N/A	80.0	N/A	1
Nara Advertising	Seoul	NA	1,499.7	1,343.6	12.0	9,301.3	8,945.1	1.33 bill.	8.22 bill.	72	56	29.0	1
Geoson	Seoul	NE	764.0	509.0	50.0	7,917.0	4,524.0	675,000.0	7.00 bill.	65	46	41.0	1
SPAIN													**Exchange rate: 0.00698 peseta**
J. Walter Thompson S.A.	Madrid	MJ	12,967.4	11,152.0	16.0	86,492.9	74,350.3	Ptas1.86 bill.	Ptas12.39 bill.	197	192	3.0	2
Lintas	Madrid	MJ	9,307.4	7,013.0	33.0	67,232.5	50,118.0	1.33 bill.	9.63 bill.	117	105	11.0	3
Tandem/DDB Needham	Madrid	MJ	9,125.6	7,626.9	16.0	60,780.6	54,980.9	1.31 bill.	8.71 bill.	N/A	N/A	N/A	2
TAPSA/N W Ayer	Madrid	MJ	9,095.0	5,305.0	71.0	66,331.0	38,599.0	1.30 bill.	9.50 bill.	91	70	30.0	2
Grupo Alas	Madrid	MJ	8,341.1	7,417.6	12.0	55,669.5	49,697.6	1.20 bill.	8.01 bill.	199	220	-10.0	17
BBDO Espana	Barcelona	MJ	7,768.4	6,509.3	19.0	62,923.9	51,287.8	1.11 bill.	9.01 bill.	105	95	11.0	2
McCann-Erickson	Madrid	MJ	7,468.6	5,618.3	33.0	50,395.6	37,482.6	1.07 bill.	7.22 bill.	108	N/A	N/A	1
HCM	Madrid	MJ	6,561.2	5,653.8	16.0	43,763.2	31,546.4	940,000.0	6.27 bill.	96	91	5.0	2
CID Publicidad	Madrid	NA	6,044.7	5,503.7	10.0	40,295.5	36,714.8	866,000.0	5.77 bill.	98	93	5.0	5
Delvico Bates Group	Madrid	MJ	5,591.0	4,809.2	16.0	37,459.6	32,221.8	801,000.0	5.37 bill.	99	97	2.0	4
Clarin Publicidad	Madrid	MJ	5,570.0	4,982.3	12.0	37,133.6	33,224.8	798,000.0	5.32 bill.	104	N/A	N/A	1
Bassat, Ogilvy & Mather	Barcelona	MJ	5,451.6	4,057.2	39.0	36,362.0	27,061.7	781,027.0	5.21 bill.	103	98	5.0	2
Danis-B&B	Madrid	MJ	5,249.0	4,048.4	30.0	36,505.4	29,316.0	752,000.0	5.23 bill.	104	86	9.0	3
Arge	Madrid	NA	4,833.0	3,104.6	56.0	28,359.7	20,242.0	692,400.0	4.06 bill.	60	57	5.0	N/A
Young & Rubicam Espana	Madrid	MJ	3,975.0	3,759.0	6.0	26,513.0	25,075.0	569,514.0	3.80 bill.	94	87	8.0	N/A
Saatchi & Saatchi Compton	Madrid	MJ	3,790.1	3,576.3	6.0	26,873.0	23,383.0	543,000.0	3.85 bill.	34	37	-8.0	2
FCB/NCK	Madrid	MJ	3,399.3	3,992.6	-15.0	22,673.0	26,664.0	487,000.0	3.25 bill.	63	66	-5.0	1
Leo Burnett	Madrid	MJ	3,342.0	2,624.0	27.0	22,283.0	17,497.0	478,836.0	3.19 bill.	51	51	0.0	1
Grupo Barro	Madrid	MN	3,210.8	1,403.0	129.0	17,450.0	9,353.2	460,000.0	2.50 bill.	31	23	35.0	1
Contrapunto	Madrid	NA	3,141.0	2,847.8	10.0	20,940.0	18,985.6	450,000.0	3.00 bill.	50	44	14.0	2
Ricardo Perez Asociados	Madrid	NA	3,002.1	2,387.2	26.0	20,242.0	15,705.0	430,000.0	2.90 bill.	23	21	10.0	N/A
BCK Alliance	Barcelona	MJ	2,931.6	2,142.9	37.0	19,544.0	14,309.0	420,000.0	2.80 bill.	29	25	16.0	2
RCP-Saatchi & Saatchi Compton	Barcelona	MJ	2,931.6	1,535.6	91.0	19,544.0	7,887.4	420,000.0	2.80 bill.	26	22	18.0	1
Ted Bates Espana	Madrid	MJ	2,331.3	1,926.5	21.0	15,621.2	12,913.0	334,000.0	2.24 bill.	36	41	-12.0	1
Publicis Moline & Publicis	Madrid	MJ	1,749.0	1,200.0	46.0	12,689.0	8,703.0	250,543.0	1.82 bill.	29	30	-3.0	2
Grey Espana	Madrid	MJ	1,619.4	1,410.0	20.0	10,801.1	9,404.4	232,000.0	1.55 bill.	34	29	17.0	1
SCACS Publicidad	Barcelona	NA	1,619.4	1,291.3	25.0	8,794.8	6,840.4	232,000.0	1.26 bill.	23	21	10.0	1
Grey Barcelona	Barcelona	MJ	1,528.6	1,605.4	-10.0	10,195.9	10,708.0	219,000.0	1.46 bill.	26	32	-19.0	2
Dos por Dos	Madrid	NA	1,361.1	N/A	N/A	9,074.0	N/A	195,000.0	1.30 bill.	24	N/A	N/A	N/A
Ogilvy & Mather Direct	Barcelona	MJ	1,253.3	994.8	26.0	8,359.2	6,635.3	179,087.4	1.19 bill.	25	21	19.0	2
TBWA	Madrid	MJ	1,136.0	932.9	22.0	7,649.0	6,219.2	162,751.0	1.10 bill.	18	21	-14.0	1
GGK	Madrid	MJ	1,062.4	614.2	73.0	7,259.2	4,096.6	152,208.0	1.04 bill.	25	19	32.0	2
Equipo 3	Madrid	MJ	1,047.0	656.0	60.0	7,618.0	4,886.0	150,000.0	1.10 bill.	16	14	14.0	1
RSCG y Asociados	Madrid	MJ	977.2	907.4	8.0	11,517.0	10,470.0	140,000.0	1.65 bill.	19	16	19.0	1
RZR	Madrid	MJ	913.5	406.2	125.0	6,092.8	2,709.6	130,868.0	872,890.0	21	10	110.0	1
GGK Madrid	Madrid	MJ	596.0	405.0	47.0	3,973.0	2,700.0	85,331.0	569,200.0	14	11	27.0	1
GGK Barcelona	Barcelona	MJ	467.0	209.4	123.0	3,281.0	1,396.0	66,877.0	470,000.0	11	8	38.0	1
Bozell, Jacobs, Kenyon & Eckhardt de Espana	Madrid	MJ	202.0	196.5	3.0	1,085.0	599.5	28,939.7	155,436.1	8	7	14.0	1
SRI LANKA													**Exchange rate: 0.0384 rupee**
Thompson Lanka	Colombo	MN	537.6	322.6	67.0	3,585.8	215.1	SLr14,000.0	SLr93,380.0	75	52	44.0	1
Grant/BJKF	Colombo	MN	365.0	409.9	-11.0	2,028.0	2,225.0	9,506.4	52,813.2	N/A	99	N/A	N/A
Minds Lanka	Colombo	MN	78.0	50.7	54.0	348.8	230.4	2,031.8	9,080.2	22	19	16.0	1
SWEDEN													**Exchange rate: 0.1381 kroner**
Ted Bates AB	Stockholm	MJ	9,513.0	9,801.0	-3.0	70,953.0	72,006.0	SKr68,888.0	SKr513,783.0	158	142	11.0	3
Kread Gruppen	Stockholm	NA	9,073.2	N/A	N/A	60,518.0	N/A	65,700.0	438,219.0	140	N/A	N/A	N/A
Hans Brindfors	Stockholm	NA	8,810.8	6,750.9	31.0	58,767.9	30,099.7	63,800.0	425,546.0	80	N/A	N/A	N/A
Grey Svenska	Stockholm	MJ	8,667.4	8,690.6	-0.0	57,811.7	57,966.5	62,762.0	418,622.0	146	141	3.0	8
Scanpartner Sverige	Gotenburg	NA	7,957.9	6,995.3	14.0	32,425.7	30,825.4	57,624.0	234,798.8	151	130	16.0	8
Svea Konsultgruppen	Stockholm	NA	7,043.1	6,987.9	1.0	46,977.5	46,609.0	51,000.0	340,170.0	145	N/A	N/A	N/A
AB Ervaco	Stockholm	NA	5,896.9	5,620.3	5.0	16,295.8	11,125.9	42,700.0	118,000.0	N/A	N/A	N/A	N/A
Concept	Stockholm	NA	5,385.9	2,980.1	81.0	35,924.0	19,877.3	39,000.0	260,130.0	55	N/A	N/A	N/A
Young & Rubicam AB	Stockholm	MJ	5,362.0	4,504.0	19.0	35,765.0	30,044.0	38,821.0	258,974.4	83	91	-9.0	N/A
McCann-Erickson AB	Stockholm	MJ	4,654.0	2,076.0	124.0	31,042.0	13,847.0	33,701.0	224,786.0	71	49	45.0	N/A
Svenska Intermarco-Farner	Stockholm	MJ	4,254.0	3,511.3	21.0	28,372.0	23,421.0	30,801.0	205,442.0	61	59	3.0	4
Hall & Cederquist	Stockholm	NA	4,004.9	3,259.2	23.0	26,712.7	21,738.6	29,000.0	193,430.0	55	N/A	N/A	N/A
Ehrenstrahle International	Stockholm	MJ	3,760.0	4,024.0	7.0	25,083.5	26,839.7	27,231.3	181,633.0	44	60	-27.0	3
Falk & Pihl/DDB	Stockholm	MJ	3,659.7	4,557.3	-20.0	11,048.0	13,810.0	26,500.0	80,000.0	24	24	0.0	1
HLR/BBDO AB	Stockholm	MJ	3,212.3	3,388.6	-5.0	21,426.3	22,590.4	23,261.0	155,150.9	40	43	-7.0	1
Blanking	Stockholm	NE	3,038.2	2,762.0	10.0	21,543.6	20,715.0	22,000.0	156,000.0	55	50	10.0	2
Ogilvy & Mather AB	Stockholm	MJ	2,989.7	3,144.8	-5.0	19,931.4	20,977.4	21,649.0	144,326.0	57	54	6.0	5

Notes

(Continued from Page 73)

schalk Goodgoll 51% owned by Lowe Marschalk Worldwide **Stringham & Grant Tandy** minority owned by BBDO Worldwide **Brandaid** gross income figures for the agency for both years are AA estimates **Bleau, Duperrey, Giguere & Associes** billings figures for both years are AA estimates **McKim Advertising** chose not to participate in this survey

CHILE

Azocar, Morrison, Walker 20% owned by J. Walter Thompson Co. **Israel & De Bianchi** affiliated with DFS Dorland Worldwide **Hermosilla, Zegers** 40% owned by BBDO **Epoca/Ted Bates** chose not to submit figures this year

CHINA

DYR Advertising Co., Beijing, opened June '86, owned 70% by DYR Inc., 20% by China United Trading and 10% by China Intl. Advertising

COLOMBIA

Atlas Publicidad affiliated with J. Walter Thompson Co. **Centrum Ogilvy & Mather** 30% owned by Ogilvy & Mather **Contacto Publicidad** affiliated with DFS Dorland **Publicidad Artefilme** majority-owned by FCB Communications

COSTA RICA

Alberto H. Garnier affiliated with BBDO

CYPRUS

Impact/BBDO also has offices in Lebanon, Egypt, Saudi Arabia, Dubai and Kuwait **Camp, Saadeh & Skaff** began operations January 1987, with offices in Nicosia and Dammam, Saudi Arabia

DENMARK

Ted Bates includes Plan Design and Norgard Mikkelsen **Young & Rubicam** includes Wunderman and Cato Johnson **Ogilvy & Mather** includes Arhus office, O&M Direct and O&M PR **Innovation** associated with Saatchi & Saatchi Compton Worldwide **Lockey/FCB** 45% owned by FCB Communications **Bergenholz & Arnesen** associated with DFS Dorland Worldwide **DMM I&P** 51% owned by DMB&B **Ervaco Kobenhavn** 1986 gross income AA estimate

ECUADOR

Norlop Thompson 20% owned by J. Walter Thompson Co. **Veritas Publicitaria** affiliated with Ogilvy & Mather

EL SALVADOR

APCU de El Salvador J. Walter Thompson Co., through APCU Thompson Asociados, Guatemala, holds 20% equity

FINLAND

Tehomainos-JWT Oy 25% owned by J. Walter Thompson Co. **Oy AC-Ilmo** associated with DFS Dorland **Oy Interplan** associated with Saatchi & Saatchi Compton **Kauppamainos** and **Markkinointiryhma Oy** gross income for both years AA estimates **Oy Valotorni** billings for 1986 and 1985 AA estimates

FRANCE

Publicis Conseil Group BCA Publicite, Edico Publicis, Grand Angle Publicis, Publicis Mediterranee, Projectis Publicis, Publicis Soleil, Edip Beverly Markagri, Safronoff De Bonneville Orlandini, Orexa, Oscar Intermarco, Publicis Sante, Siquier Courcelle and Success. All offices majority owned **Belier** Belier Conseil, Belier Rive Gauche, Atelier Belier, Alice, Equateur, Australie, Impact and six regional agencies. Eurocom owns 100% of Belier **Roux, Seguela, Cayzac & Goudard** figures include Racines, Chevassus Vadon, Glad, Seven, Motivente and 16 regional offices **Univas France** includes Robert & Partners, ECOM, Groupe Futurs and New Robert & Partners. Eurocom owns 100% of Univas **BDDP Group** includes BBDP Paris, regional agencies and Tequila, Messages, CPM, Mafia and BED **Polaris**, an eight-agency regional network, majority owned by Eurocom **Young & Rubicam France** includes figures for Wunderman, Cato Johnson, Sudler & Hennessey, Burson-Marsteller **DDB Needham Worldwide** includes Colin Guittard (19% equity), DDB Regions (90%), DDB SA (100%), Intermail Rapp & Collins (90%) and Optimum Media (100%) **Saatchi & Saatchi Compton France** includes figures for References, Compar, S&SC Ethical, DP Industries, Doping, Club Media, S&SC Direct and Agency MC Groupe **SSC&B:Lintas Worldwide France** includes Lintas Paris, Initiatives Media and Sprint **FCA!** includes Concurrence Moderne (82.5% equity), Marianne (32.8%), FRG Bonjour (16.7%) and B. Moors (34.0%) **McCann-Erickson France** includes Joannis Schneider, McCann-Erickson S.A. and Universal Media **CLM/BBDO** 60% owned by BBDO Worldwide **Impact** 44% owned by FCB Communications **RSCG Export** 100% owned by RSC&G, covers agencies in Africa, the Middle East and the Caribbean. **Gaudin & Lichtenberg** 25% owned by Lowe Marschalk **Eldorado** majority owned by Eurocom **Creative Business International** majority owned by RSC&G **CPV** 70% owned by Bozell, Jacobs, Kenyon & Eckhardt **Entente Delacroix** 36.5% owned by Ted Bates **Audour/Soum Scali, McCabe, Sloves** 30% owned by SMS, opened Feb. '86

GERMANY

Team/BBDO includes offices in Hamburg, Berlin, Team/Direct, BBDO/-Telecom and Selection **McCann-Erickson** includes Universal-Kommunikation and McCann-Erickson Intensiv **J. Walter Thompson** includes offices in Hamburg, Frankfurt and Basis Research **Young & Rubicam** includes Wunderman, Cato Johnson, Sudler & Hennessey and Burson-Marsteller**Grey-Duesseldorf** includes G.R.A.M.M./Arc **Saatchi & Saatchi Compton** includes Contur and D&H Agentur fuer Direkt Marketing **Doyle Dane Bernbach** DDB did not submit data. Figures are AA estimates **Eggert-DYR** 40% owned by DYR **Scholz & Friends** majority-owned by Ted Bates Worldwide **Ted Bates Werbeagentur** includes majority-owned Cerca **Serviceplan, Bessere Werbung, Lueders, Spiess & Ermisch, Acon, Ernst & Partner, Borsch, Stengel & Partner,** and **Hakuhodo** figures are AA estimates **Lowe Marschalk Luerzer** 75% owned by Lowe Marschalk Worldwide **Von Mannstein Gruppe** includes offices in Duesseldorf, Munich and Paris **Hildmann Simon Rempen & Schmitz/SMS** 63.4% owned by Scali, McCabe, Sloves **RSCG, Butter, Rang** 51% owned by RSC&G, Paris **Consell** majority owned by Grey Advertising **Handley, Smith & Partners** majority owned by Bozell, Jacobs, Kenyon & Eckhardt

GREECE

Spot/Thompson 44% owned by J. Walter Thompson Co. **Bold Advertising** affiliated with Ogilvy & Mather Worldwide **BBDO Advertising** formerly Ikon/DD/BBDO **Olympic/DDB Needham** affiliated with DDB Needham Worldwide **Gnomi/FCB** 40% owned by FCB Communications **Lamda Alpha Advertising** affiliated with N W Ayer **Grafis Advertising** 26% owned by BBDO Worldwide **Interpress** began operation in May 1985

GUATEMALA

APCU Thompson Asociados J. Walter Thompson Co. holds 40% equity in offices in Panama, Costa Rica, El Salvador and Honduras **Concepto**

(Continued on Page 77)

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Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1985	Employes 1986	Employes 1985	Employes Percent change	Number offices
				($000)			($000)	($000; national currency)					
Stig Arbman	Stockholm	NA	3,024.4	3,217.7	-6.0	20,172.7	21,462.3	21,900.0	146,073.0	46	N/A	N/A	N/A
SSC&B:Lintas AB	Stockholm	MJ	2,876.0	2,554.3	13.0	16,746.9	13,501.6	20,825.5	121,266.6	43	46	-7.0	1
Anderson & Lembke	Stockholm	NA	2,762.0	2,693.0	3.0	18,422.5	17,953.0	20,000.0	133,400.0	N/A	N/A	N/A	2
Stroemgren & Malmros Alliance	Stockholm	MJ	2,500.0	2,100.0	19.0	10,100.0	8,300.0	18,100.0	73,200.0	20	20	0.0	1
Anderson & Lembke	Helsingborg	NA	2,347.7	N/A	N/A	15,467.2	N/A	17,600.0	112,000.0	26	22	18.0	1
DMB&B	Stockholm	MJ	2,229.0	2,128.0	5.0	25,107.0	22,492.0	16,140.0	181,804.0	40	40	0.0	1
Blomquistbyraerna	Stockholm	NA	2,223.0	N/A	N/A	19,154.5	N/A	16,100.0	138,700.0	40	N/A	N/A	1
J. Walter Thompson Co. AB	Stockholm	MJ	1,758.3	1,588.7	11.0	11,727.8	10,587.7	12,732.0	84,922.4	26	24	8.0	1
Welinder	Stockholm	NA	1,726.0	1,450.0	19.0	13,000.0	10,500.0	12,500.0	94,500.0	23	21	10.0	1
Foote, Cone & Belding	Stockholm	MJ	1,647.3	1,482.8	11.0	10,987.3	9,890.5	11,928.1	79,560.4	30	32	-6.0	2
Hallstedt & Hvid AB	Stockholm	NA	1,588.2	N/A	N/A	10,840.9	N/A	11,500.0	78,500.0	18	N/A	N/A	1
Nedeby Ayer	Stockholm	MJ	961.6	861.7	12.0	3,190.2	5,747.8	6,962.7	23,100.6	N/A	18	N/A	1
DFS Pihlstroem AB	Stockholm	MN	919.6	574.2	60.0	8,119.3	5,315.1	6,659.0	58,793.0	13	10	30.0	1
RSCG Hawi	Stockholm	MJ	828.6	N/A	N/A	2,071.5	N/A	6,000.0	15,000.0	12	N/A	N/A	1
Thor & Co. AB	Stockholm	NA	359.0	N/A	N/A	2,394.9	N/A	2,600.0	17,342.0	5	N/A	N/A	N/A
NPP Reklambyra	Oerebro	NA	331.4	124.3	167.0	2,209.6	828.6	2,400.0	16,000.0	13	8	63.0	1
JGM Annonsbyra	Stockholm	NA	145.0	186.4	-22.0	966.7	1,242.9	1,050.0	7,000.0	5	7	-29.0	N/A
SWITZERLAND													**Exchange rate: 0.5371 franc**
GGK	Basel/Zurich	MJ	6,327.0	5,685.5	11.0	43,121.0	37,921.0	SF11,780.0	SF82,285.0	81	69	17.0	2
Adolf Wirz	Zurich	NA	6,060.0	5,418.0	12.0	40,418.0	36,136.0	11,282.0	75,253.0	74	60	23.0	1
Advico AG	Zurich	NE	5,975.2	5,679.3	5.0	39,855.5	37,880.6	11,125.0	74,205.0	64	64	0.0	1
McCann-Erickson S.A.	Geneva/Zurich	MJ	5,734.0	5,869.0	-2.0	38,246.0	39,146.0	10,675.0	71,202.0	60	68	-12.0	N/A
Young & Rubicam AG	Zurich	MJ	5,545.0	5,059.5	10.0	36,985.0	33,779.0	10,314.0	68,614.7	69	66	5.0	N/A
HCM Switzerland	Zurich/Geneva	MJ	5,137.0	4,648.0	10.0	34,267.0	30,991.0	9,565.0	63,800.0	70	63	11.0	2
Gisler & Gisler/BBDO	Zurich	MJ	4,866.7	4,752.3	2.0	32,460.7	31,697.5	9,061.0	60,437.0	60	62	-3.0	1
Lintas:Zurich	Zurich	MJ	4,038.1	3,737.6	8.0	27,134.7	24,929.8	7,518.4	50,520.7	51	49	4.0	1
Leo Burnett Group	Zurich	MJ	4,018.0	3,392.0	18.0	26,788.0	22,616.0	7,481.0	49,875.0	46	48	-4.0	2
Farner Publicis	Zurich	MJ	3,977.0	4,606.0	-14.0	26,533.0	30,722.0	7,405.0	49,400.0	62	62	0.0	1
Doyle Dane Bernbach	Kuesnacht	MJ	3,854.8	3,641.5	6.0	25,711.5	24,288.7	7,177.0	47,871.0	52	54	-4.0	2
Aebi & Partner	Zurich	NA	3,491.2	2,792.9	25.0	21,484.0	17,724.3	6,500.0	40,000.0	49	37	32.0	N/A
Dieter Jaeggi	Bern/Zurich	NA	3,425.0	2,691.0	27.0	22,849.0	17,939.0	6,370.0	42,500.0	38	31	23.0	2
Ogilvy & Mather	Zurich	MJ	3,340.0	3,249.0	3.0	22,280.0	21,656.0	6,218.0	41,480.0	44	42	5.0	1
Kloeti Advertising	Zurich	MN	3,131.3	2,980.9	5.0	21,215.5	19,872.7	5,830.0	39,500.0	32	31	3.0	1
Zutter Sommer Marketing	Basel/Zurich	NA	3,056.0	2,770.0	10.0	20,415.1	18,978.0	5,690.0	38,010.0	34	29	17.0	2
Heinz Heimann-Unicom	Geneva	MJ	2,846.6	3,168.9	-10.0	18,987.0	21,136.5	5,300.0	35,351.0	46	39	18.0	2
Seiler Zurich Werbeagentur	Zollikerberg	NA	2,821.9	2,691.9	5.0	18,814.6	17,955.3	5,254.0	35,030.0	N/A	42	N/A	1
J. Walter Thompson	Zurich	MJ	2,546.9	2,481.4	3.0	16,988.0	16,550.7	4,742.0	31,629.0	30	31	-3.0	1
TBWA	Zurich	MJ	2,207.0	2,172.6	2.0	14,724.0	14,492.6	4,109.0	27,414.0	22	22	0.0	1
BEP	Lausanne	MJ	1,630.0	1,675.0	-3.0	10,850.0	11,170.0	3,030.0	20,200.0	23	24	-4.0	1
Cash RSCG	Zurich	MJ	1,504.0	1,461.0	3.0	10,474.0	10,232.0	2,800.0	19,500.0	19	N/A	N/A	1
Grey Switzerland/ Creative Collaboration	Geneva	MN	1,326.6	1,208.5	10.0	8,848.4	8,060.5	2,469.9	16,474.4	19	19	0.0	1
Guenter und Leuenberger	Zurich	NA	618.3	805.7	-23.0	3,867.1	5,639.6	1,150.0	7,200.0	5	8	-38.0	1
Peter Berger	Zurich	NA	415.0	410.0	1.0	2,800.0	2,740.0	772.0	5,210.0	5	5	0.0	1
T.C. Mettler	Zurich	NE	320.0	N/A	N/A	1,800.0	N/A	583.7	3,283.2	5	N/A	N/A	1
Peter Wirz Werbeorganisation	Zurich	MJ	258.0	242.0	7.0	1,720.0	1,616.0	480.0	3,200.0	6	5	20.0	1
Rogivue Consulting	Zurich	NA	100.0	120.7	-17.0	680.0	810.0	184.6	1,265.0	1	2	-100.0	1
TAIWAN													**Exchange rate: 0.0247 T dollar**
Eastern Advertising	Taipei	NA	1,336.8	1,264.4	6.0	9,371.0	8,742.0	T$54,120.0	T$328,000.0	82	82	0.0	2
United Communications	Taipei	NE	1,230.8	822.7	50.0	12,692.6	8,814.7	49,829.0	513,870.0	80	65	23.0	1
Gaynor Associates	Taipei	NE	1,140.9	874.2	31.0	7,607.6	5,831.1	46,189.4	308,000.0	64	44	45	1
Hwa Wei & Grey	Taipei	MN	1,111.5	926.3	20.0	7,413.7	6,178.1	45,000.0	300,150.0	62	62	0.0	2
Target Advertising	Taipei	NE	883.0	841.2	5.0	4,647.4	4,403.1	35,748.9	188,153.9	36	32	13.0	1
Stentor/BBDO	Taipei	MN	864.5	704.0	23.0	6,175.0	4,693.0	35,000.0	250,000.0	55	45	22.0	1
Leo Burnett Co.	Taipei	MJ	691.0	318.0	117.0	4,606.0	2,121.0	27,972.0	186,489.0	53	33	61.0	1
SSC&B: Lintas Taiwan	Taipei	MJ	252.9	N/A	N/A	1,580.8	N/A	10,240.0	64,000.0	23	N/A	N/A	1
THAILAND													**Exchange rate: 0.0453 baht**
SSC&B: Lintas	Bangkok	MJ	5,367.0	4,790.0	12.0	38,123.0	35,386.0	Bh118,471.0	Bh841,566.0	159	160	-1.0	2
Ogilvy & Mather	Bangkok	MJ	3,305.3	3,307.2	0.0	21,151.5	21,328.4	72,964.5	466,921.3	135	136	-1.0	1
SPA Advertising	Bangkok	NE	2,038.5	N/A	N/A	8,154.0	N/A	45,000.0	180,000.0	120	100	20.0	1
Leo Burnett/Diethelm Advertising	Bangkok	MJ	1,790.0	1,920.0	-7.0	9,740.0	10,870.0	39,500.0	215,000.0	106	103	3.0	1
McCann-Erickson	Bangkok	MJ	1,790.0	1,809.0	-1.0	11,939.0	12,066.0	39,522.0	263,612.0	90	94	-4.0	N/A
J. Walter Thompson Co.	Bangkok	MJ	1,202.8	790.5	52.0	6,820.1	4,482.0	26,552.9	150,554.8	48	37	30.0	1
Prakit & FCB	Bangkok	MN	951.3	815.4	17.0	6,342.0	5,436.0	21,000.0	140,000.0	91	71	28.0	1
Amex & Grey Advertising	Bangkok	MN	650.9	692.7	-6.0	4,341.7	4,620.2	14,369.2	95,842.6	56	56	0.0	1
DDB Needham Worldwide	Bangkok	MN	532.0	326.9	63.0	3,548.4	2,180.5	11,744.0	78,332.2	30	28	7.0	1
DYR Ltd.	Bangkok	MJ	479.0	264.0	81.0	2,697.0	1,064.0	10,589.2	59,536.3	34	21	62.0	1
Paterson & Partners	Bangkok	MJ	343.9	N/A	N/A	1,910.4	N/A	7,591.0	42,172.0	20	N/A	N/A	1
Ogilvy & Mather Direct	Bangkok	MJ	128.8	N/A	N/A	859.2	N/A	2,843.7	18,967.7	7	N/A	N/A	1
Synergie Communications	Bangkok	NE	66.2	N/A	N/A	2,205.0	N/A	1,653.8	55,125.4	34	N/A	N/A	1
TRINIDAD													**Exchange rate: 0.2843 T dollar**
McCann-Erickson (Trinidad)	Port of Spain	MJ	2,262.0	1,948.0	16.0	15,088.0	12,993.0	T$7,956.0	T$53,067.0	69	78	-12.0	N/A

Notes

(Continued from Page 75)

Concepto affiliated with BBDO Worldwide

HONG KONG

Synergie Communications 35% owned by BJK&E **Far East-Ketchum** Minority owned by Ketchum Advertising **Results (HK)** 100% owned by Ogilvy & Mather **Lee Davis Advertising** N W Ayer acquired minority holding in May, 1987 **Mojo MDA Asia** combines Hong Kong and Singapore offices **Ball Partnership** Figures did not arrive in time. 1986 gross income of $1.21 million on billings of $8.05 million

INDIA

Hindustan Thompson Associates Affiliated with J. Walter Thompson Co. **Lintas India** 40% owned by SSC&B:Lintas **Ogilvy Benson & Mather** 40% owned by Ogilvy & Mather **Everest Advertising** Minority owned by Saatchi & Saatchi Compton **R.K.Swamy Advertising** Affiliated with BBDO **Chaitra Advertising** Signed affiliation agreement with Leo Burnett Co. April '87 **Advertising and Sales Promotion** Affiliated with N W Ayer **Sista's Private Ltd.** Affiliated with DFS Dorland **Contract Advertising** Affiliated with J. Walter Thompson Co. **Trikaya Advertising** Affiliated with Grey **Contract Advertising** Majority owned by Hindustan Thompson, non-equity affiliation with JWT **Rediffusion Advertising** affiliated with Ted Bates, did not report figures **Clarion Advertising Services** Figures arrived too late for inclusion in chart. 1986 gross income of $2.9 million on billings of $19 million

INDONESIA

PT Citra:Lintas Affiliated with SSC&B:Lintas **Fortune** Associated with Saatchi & Saatchi Compton **P.T. Bates Mulia Indonesia** Affiliated with Ted Bates **Ad Force** Affiliated with J. Walter Thompson **P.T. Perwanal** 45% owned by DMB&B **P.T. Sulisto** Affiliated with BBDO

IRELAND

O'Kennedy-Brindley and **Hunter Advertising** associated with Saatchi & Saatchi Compton **Peter Owens** and **Brian Cronin** gross income for both years AA estimate

ISRAEL

Information for Israeli agencies came in too late. Billings, in U.S. dollars, were supplied by Israel Advertiser Association, gross income figures AA estimates. 1986 figures for all Tel Aviv-based agencies follow: **Wimmer, Tamir, Cohen (Jacobson)** Gross income: $2,250.0; billings $15,000.0 **Gitam** $2,250.0; $15,000.0 **Dahaf** $1,500.0; $10,000.0 **Warshabski Frielich** Affiliated with Grey Advertising. Gross income: $1,500.0; Billings: $10,000.0 **OK** $1,200.0; $8,000.0 **Pelled** $1,350.0; $9,000.0 **Pirsum Tal** $1,200.0; $8,000.0 **Bing Lineal** $900.0; $6,000.0

ITALY

Young & Rubicam Italia includes Cato Johnson and Burson-Marsteller **Italia/BBDO** 40% owned by BBDO **Livraghi, Ogilvy & Mather** 49% owned by Ogilvy & Mather **SSC&B:Lintas** includes Centro Media **RSCG Mezzano Costantini Mignani** 51% owned by RSC&G, Paris **P.T. Needham** 30% owned by DDB/Needham. Gross income and billings for '86 AA estimates **Bozell, Jacobs, Kenyon & Eckhardt e Associati** 50% owned by BJK&E **B Communications** associated with DFS Dorland **Promarco Advertising** gross income for both years AA estimate **Pubblimarket Alliance** minority-owned by London-based Lopex **Dorland Italiana** 36% owned by DFS Dorland **Broucc & DDB** 9 months only **Pubbli Dan Wirz** 25% owned by Adolf Wirz, Zurich, Switzerland

JAMAICA

Lindo, Foote, Cone & Belding 15% owned by FCB Communications

JAPAN

I&S Corp. formerly Dai-Ichi Advertising which merged Oct. with SPN Co., a communications and sales promotion company of Seibu Saison Group **Asatsu** minority owned by BBDO **Asahi Advertising** Affiliated with Saatchi & Saatchi Compton **Chuo Senko Advertising** offices in Thailand, Hong Kong and Singapore **Mannen-sha** Affiliated with DMB&B **Grey Daiko Advertising** 50% owned by Grey **DFS Dorland/Tokyo** formerly known as NDC/DFS Intl., an affiliation which was dissolved end '86 **Cove-Ito Advertising** fully-owned offices in Thailand and Hong Kong, holds 47% equity in Cove-Ito McLarty, Toronto **Meitsu BJK&E** 30% owned by Bozell, Jacobs, Kenyon & Eckhardt **Yomiko DFS International** 49% owned by DFS Dorland Worldwide

LEBANON

Grant Advertising & Associates 10% owned by Bozell, Jacobs, Kenyon & Eckhardt, headquartered in Athens, does business in Lebanon and Kuwait **Enterprise Middle East**, majority owned by Leo Burnett Co., headquartered in Athens, does business in the Middle East

MALAWI

Graphic:Lintas Malawi 49% owned by SSC&B:Lintas

MALAYSIA

PTM Thompson Advertising 25% owned by J. Walter Thompson Co. **KHK Needham Standard** 30% owned by DDB Needham **SSC&B:Lintas** 49% owned by SSC&B:Lintas **Ted Bates** 49% owned by Ted Bates Worldwide **AP:Foote, Cone & Belding** 30% owned by FCB Communications **Wings Creative** 25% owned by BBDO Worldwide **Bozell, Jacobs, Kenyon & Eckhardt** 47.86% owned by BJKE **Dancer Fitzgerald Sample** 29% owned by DFS Dorland Worldwide **Grant Advertising** 20% owned by BJKE **Ball Partnership** Figures did not arrive in time. 1986 gross income of $490.0 on billings of $3,236.0

MEXICO

Publicidad Ferrer formed joint venture with Davis, Johnson, Mogul & Colombatto, Los Angeles in Feb. '87 **Panamericana Ogilvy & Mather** 25% owned by Ogilvy & Mather **iconic** Affiliated with DFS Dorland Worldwide **Bozell, Jacobs, Kenyon & Eckhardt** 49% owned by BJKE **Dieste, Merino/BBDO** 42% owned by BBDO Worldwide **Arellano Ted Bates** did not provide figures, due to disagreement with the way Mexican agency figures are submitted

MOROCCO

Shem's Publicite Affiliated with McCann-Erickson

NETHERLANDS

FHV/BBDO Group 50.33% owned by BBDO Worldwide, includes BBDO Industrieel (30.95% equity) and Impuls/-BBDO (50.33%) **PMSvW/Young & Rubicam** includes PMSvW, 100% owned by Y&R. Also Wunderman, Cato Johnson and Burson-Marsteller **PPGH/Moussault** 40% owned by BBDO **Van Jaarsfeld/Fontein** majority owned by London-based Lopex **McCann-Erickson** includes McCann Industrieel, McCann Direct and Universal Media **ARA B.V.** 56% owned by BBDO **H.V.R.** acquired in Dec.'86 by Prad Alliance **Klein/Theeuwes/van der Meulen** 65% owned by Paris-based Eurocom **DFS Dorland** 52% owned by DFS Dorland **RSCG Van Diggele, Janzen, Schoenmaker** 51% owned by RSC&G, Paris

NEW ZEALAND

Colenso Communications, Rialto Advertising and **Hutcheson Knowles Marinkovich** Minority owned by BBDO **MDA Mackay King** Affiliated with Bozell, Jacobs, Kenyon & Eckhardt **USP Needham New Zealand** Name changed from J. Inglis Wright **Haines Advertising** Gross income for both years AA estimate **Dobbs-Wiggins McCann-Erickson** M-E acquired 100% ownership in 1985 **J. Walter Thompson New Zealand** did not submit figures

NORWAY

Ted Bates '85 gross income AA estimate **Scanpartner Norge** gross income for both years AA estimate **Schjaerven/J. Walter Thompson** affiliated with JWT **B&L Creative Service** 90% owned by Ted Bates **Ottesen Bates** 40% owned by Ted Bates **Foote, Cone & Belding AS** 45% owned by FCB Communications **B.J. Kverneland, Ervaco Norway** gross income for both years AA estimates **Lund & Lommer** affiliated with DFS Dorland did not submit figures

PAKISTAN

R:Lintas Affiliated with SSC&B:Lintas Gross income figures AA estimate

PANAMA

Campagnani, Aleman Publicidad affiliated with Leo Burnett Co.

PERU

Publicistas Asociados Affiliated with BBDO Worldwide

Since the Peruvian sol was devaluated last year, and a new currency (the inti) was created, figures for '86 and '85 are not comparable

PHILIPPINES

Advertising and Marketing Associates affiliated with N W Ayer **Philippine Advertising Counselors** affiliated with BBDO **Basic/Foote, Cone & Belding** 40% owned by FCB Communications **SSC&B:Lintas Worldwide Philippines** 30% owned by SSC&B:Lintas Worldwide **Matrix Communications** Minority owned by Grey

PORTUGAL

Ciesa-NCK 60% owned by FCB Communications **FCB Portugal** 51% owned by FCB **Sistema** Associated with Saatchi & Saatchi Compton **Boom & Bates** 35% owned by Ted Bates **Unitros Portugal** 55% owned by HCM **Ogilvy & Mather Portugal** 90% owned by O&M **Antena Publicidade** Affiliated with BBDO **DDB Needham & Guerreiro** 69.9% owned by DDB Needham

PUERTO RICO

Young & Rubicam Puerto Rico includes Burson-Marsteller **Marti, Flores, Prieto & Wachtel** 22.5% owned by J. Walter Thompson Co. **J.R. Marquina & Associates** Affiliated with DFS Dorland **BBDO Puerto Rico** 87% owned by BBDO

SINGAPORE

Bozell, Jacobs, Kenyon & Eckhardt 73% owned by BJKE **BBDO Advertising Singapore** 87.5% owned by BBDO **DMB&B** 52% owned by DMB&B **CR & Grey** Agency opened in January, 1986 **Ball Partnership** Figures did not arrive in time. 1986 gross income of $1,072.0 on billings of $7,075.0

SOUTH AFRICA

Grey Philips Bunton Mandel & Blake minority owned by Grey, includes Grey Direct, Grey Communications, Grey Rakusin, Grey Action, Grey Medical, Grey Recruitment, Grey Appointments, Grey Mann and Grey Perspectives **Bates Wells** Affiliated with Ted Bates. Includes Bates Wells Cape and Pretoria, Bates Wells Retail Decisions, Bates Wells Specialized Advertising, Bates Hickman & Associates, Cerna, Diagram, Bates Recruitment, Adgraphics **Young & Rubicam South Africa** 75% owned by Y&R **Ogilvy & Mather Rightford Searle-Tripp & Makin** 42% owned by Ogilvy & Mather **Lindsay Smithers-FCB Holdings** 24% owned by FCB **McCann-Erickson South Africa** includes G. de Villiers & Co. **Klerck & McCormac** Affiliated with Saatchi & Saatchi Compton. Figures include Barker McCormac, (51% equity), KMP, KMP Recruitment and Klerck & White **J. Walter Thompson Co. South Africa** 28.2% owned by JWT Co. **Venture Freedman Rossi/BBDO** Affiliated with BBDO **Partnership in Advertising** 24% owned by FCB Communications **Graphic Advertising Services, Venture Marketing** and **Advertising and Venture CBD** Affiliated with BBDO

SOUTH KOREA

Korea First Advertising Affiliated with Ted Bates and Hakuhodo **Daehong Advertising** Associated with Saatchi & Saatchi Compton **Korad International** Affiliated with Ogilvy & Mather **LG Ad** Affiliated with BBDO **Union Advertising** Affiliated with Grey Advertising and Daiko, Tokyo **Dongbang Advertising, Samhee Advertising, Seoul Agency** Gross income for both years AA estimates **Diamond Advertising** Affiliated with Bozell, Jacobs, Kenyon & Eckhardt. Gross income for both years AA estimates **Geoson** Affiliated with FCB Communications **Nara Advertising** Affiliated with J. Walter Thompson Co., Tokyu Agency, Tokyo and DMB&B, Hong Kong

SPAIN

Tandem DDB/Needham includes Carvis Needham, Madrid/Barcelona and Tandem/DDB/Campmany Guasch **Grupo Alas** majority owned by Ted Bates, includes media-buying shop Interdis, with '86 billings of $26.5 million **BBDO Espana** 80% owned by BBDO **McCann-Erickson** submitted combined 1985 and 1986 figures for its Madrid office and majority owned Clarin. AA separated the figures since the two agencies are competitive in the Spanish market. **Delvico Bates** 60% owned by Ted Bates **Basset, Ogilvy & Mather** 80% owned by Ogilvy & Mather **Danis B&B** 51.2% owned by DMB&B. Includes B&B Direct and B&B Promotions **Saatchi & Saatchi Compton** and majority owned **RCP** operate two competing offices. AA separated the figures **Grupo Barro** 30% owned by Colett Dickenson Pearce, London **Ted Bates Espana** 60% owned by Ted Bates **Dos por Dos** 1986 gross income AA estimates **Equipo 3** majority owned subsidiary of TAPSA/N W Ayer **RZR** majority owned by FCB Communications **BJKE de Espana** 51% owned by Bozell, Jacobs, Kenyon & Eckhardt

SRI LANKA

Thompson Lanka 49% owned by J. Walter Thompson Co. **Grant/BJKE** 40% owned by Bozell, Jacobs, Kenyon & Eckhardt. Gross income for '86 AA estimate **Minds Lanka** 40% owned by Bozell, Jacobs, Kenyon & Eckhardt

(Continued on Page 78)

Top 10 agency holding companies

	Agency	Gross Income	Billings
1.	Saatchi & Saatchi PLC[1]	$1.21 bill.	$8.26 bill.
2.	Interpublic Group of Cos.[2]	822.4	5.55 bill.
3.	Omnicom Group[3]	820.1	5.82 bill.
4.	JWT Group[4]	644.8	4.30 bill.
5.	Ogilvy Group[5]	548.7	3.80 bill.
6.	Eurocom[6]	216.4	1.46 bill.
7.	Lowe Howard-Spink & Bell PLC[7]	111.3	759.8
8.	WCRS Group PLC[8]	86.2	660.3
9.	Alliance International[9]	66.7	437.8
10.	Mojo-MDA International[10]	42.4	282.8

[1]Saatchi & Saatchi PLC includes: Saatchi & Saatchi Compton Worldwide, Backer & Spielvogel, KHBB, Ted Bates Worldwide, DFS Dorland Worldwide.
[2]Interpublic Group of Cos. includes: McCann-Erickson Worldwide, SSC&B:Lintas Worldwide, Campbell-Ewald Worldwide, Lowe Marschalk Inc. (70% owned by Interpublic, 30% by Lowe Howard-Spink & Bell PLC) and Dailey & Associates.
[3]Omnicom Group includes: BBDO Worldwide, DDB Needham Worldwide and Diversified Agency Services.
[4]JWT Group includes: J. Walter Thompson USA; Thompson Recruitment Advertising; Brouillard Communications; Lord, Geller, Federico, Einstein; Hill & Knowlton and MRB Group.
[5]Ogilvy Group includes: Ogilvy & Mather Worldwide; Scali, McCabe, Sloves Group and Cole & Weber.
[6]Eurocom includes: 51% of HCM; Belier; Polaris; Univas France, O.P.F., Eldorado, Havas Contact, O.P. France, Eurofi, Information Societes France; Geers Gross (20% equity) and offices in Italy, Netherlands, Switzerland and Spain.
[7]Lowe Howard-Spink & Bell PLC includes: Lowe Howard-Spink U.K., Lowe Marschalk U.S. (30% equity); Allen, Brady & Marsh; offices in Australia, Austria, Belgium, Canada, France, Germany, Italy and Netherlands and pr and sponsorship holdings.
[8]WCRS Group PLC includes WCRS & Partners Ltd., FCO Ltd., Della Femina Travisano & partners; HBM/Creamer and pr, design and sponsorship holdings.
[9]Alliance International, with 16 agencies in 8 countries, is a totally owned subsidiary of Lopex PLC, London. The U.S. arm of the network is Warwick Advertising, New York.
[10]Mojo MDA International includes: Mojo MDA Australia, Mattingly network, Mojo MDA Asia (offices in Hong Kong and Singapore) and Mojo MDA-Allen & Dorward, San Francisco.
Figures are in million of dollars

Source: Compiled by *Advertising Age*.

Ilse Cermak, international copy editor, responsible for the Foreign Agency Income Report; Ellen Mardock, designer, responsible for the graphics of the section.

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Ramona Bechtos was international editor of Ad Age for 11 years.

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Roberto Duailibi, the 'D' in DPZ — Duailibi, Petit, Zaragoza Propaganda S.A., one of the largest and most creative agencies in Brazil.

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Agency	City		Gross income 1986	Gross income 1985	Percent change income	Billings 1986	Billings 1985	Gross income 1986	Billings 1988	Employes 1986	Employes 1985	Employes Percent change	Number offices
				($000)			($000)	($000; national currency)					
Lonsdale Advertising	Port of Spain	NA	747.6	673.8	11.0	4,546.8	4,284.3	2,629.6	15,993.1	36	36	0.0	2
Corbin Compton	Port of Spain	MJ	575.0	583.6	-1.0	2,881.9	2,667.0	2,022.7	10,136.9	33	38	-13.0	1
Hernandez/FCB	Port of Spain	MN	525.3	515.3	2.0	3,503.8	3,437.2	1,847.7	12,324.2	28	28	0.0	1
Bozell, Jacobs, Kenyon & Eckhardt Caribbean	Port of Spain	MN	358.2	412.2	-13.0	1,705.8	1,961.7	1,260.0	6,000.0	22	25	-12.0	1
TURKEY													**Exchange rate: 0.0015 lira**
Manajans/Thompson	Istanbul	MN	3,233.1	1,935.9	67.0	9,371.2	7,748.2	TL2.16 bill.	TL14.06 bill.	124	112	11.0	2
Cenajans	Istanbul	NE	2,025.0	1,125.0	80.0	13,750.5	10,380.0	1.35 bill.	9.17 bill.	85	85	0.0	2
Pars/McCann-Erickson	Istanbul	MJ	1,980.0	1,189.3	67.0	13,215.0	7,935.0	1.32 bill.	8.81 bill.	86	80	8.0	4
Ajans Ada	Istanbul	NA	1,764.0	1,041.0	69.0	9,322.5	5,595.0	1.18 bill.	6.21 bill.	90	75	20.0	2
Guzel Sanatlar Reklamcilik	Istanbul	NE	1,730.0	787.3	120.0	17,800.0	11,925.0	1.15 bill.	11.87 bill.	73	68	7.0	1
Moran Ogilvy & Mather	Istanbul	MN	1,590.0	666.0	139.0	9,195.0	4,485.0	1.06 bill.	6.13 bill.	59	61	-3.0	1
Grafika-Maya	Istanbul	MN	1,147.5	772.5	49.0	7,950.0	5,550.0	765,000.0	5.30 bill.	69	58	19.0	2
Reklamevi	Istanbul	NA	718.5	264.0	172.0	3,855.0	2,289.0	479,000.0	2.57 bill.	30	21	43.0	1
Merkez Ajans	Istanbul	NA	674.8	530.0	27.0	3,465.8	2,670.0	449,880.0	2.31 bill.	38	38	0.0	1
Radar Reklam	Istanbul	NA	617.0	295.6	109.0	4,113.0	1,971.0	411,297.0	2.74 bill.	39	38	3.0	1
Fulmar Advertising	Istanbul	NA	540.0	360.0	50.0	3,225.0	2,250.0	360,000.0	2.15 bill.	26	25	4.0	1
Icancilik	Istanbul	NA	519.9	382.1	36.0	4,037.6	3,180.2	346,590.9	2.69 bill.	38	35	9.0	1
Yaratim/FCB	Istanbul	MN	495.0	280.5	76.0	3,307.5	2,025.0	330,000.0	2.21 bill.	25	18	39.0	1
Rota Advertising	Istanbul	NA	488.8	418.2	17.0	3,760.0	3,138.8	325,893.1	2.51 bill.	41	46	-11.0	2
Repro A.S.	Istanbul	NA	458.7	256.7	79.0	3,062.0	2,335.5	305,772.5	2.04 bill.	37	35	6.0	1
Markom A.S.	Istanbul	NA	393.0	217.5	81.0	2,871.0	1,500.0	262,000.0	1.91 bill.	27	26	4.0	1
Admar	Istanbul	NA	346.5	253.5	37.0	3,534.0	1,716.0	231,000.0	2.36 bill.	19	16	19.0	1
Ekol Advertising	Istanbul	NA	275.6	129.4	113.0	1,837.5	862.5	183,750.0	1.23 bill.	23	15	53.0	1
Aya Ad Services	Istanbul	NA	236.3	245.5	-4.0	1,575.0	1,631.7	157,500.0	1.05 bill.	30	36	-17.0	1
A&D International Advertising	Istanbul	NA	198.1	123.2	61.0	2,076.5	2,076.8	132,078.1	1.38 bill.	31	32	-3.0	1
Prizma	Istanbul	NA	154.5	63.0	145.0	2,490.0	948.0	103,000.0	1.66 bill.	19	15	27.0	1
URUGUAY													**Exchange rate: 0.0072 peso**
Corporation Publicitaria	Montevideo	NA	1,035.0	384.9	169.0	4,500.0	1,663.2	Ps143,750.0	Ps625,000.0	45	34	32.0	1
Impetu Organizacion Publicitaria	Montevideo	NE	877.8	488.4	80.0	3,657.6	2,000.3	121,920.0	508,000.0	64	59	8.0	1
McCann-Erickson	Montevideo	MJ	247.0	132.0	87.0	1,647.0	880.0	34,363.0	229,201.0	14	15	-7.0	N/A
Grey-Uruguay	Montevideo	MN	220.8	128.1	72.0	1,472.7	854.4	30,675.8	204,607.6	14	17	-18.0	1
VENEZUELA													**Exchange rate: 0.0559 bolivar**
J. Walter Thompson de Venezuela	Caracas	MJ	4,941.6	4,203.3	18.0	32,960.8	27,953.3	Bs71,618.1	Bs477,692.6	153	162	-6.0	1
Corpa	Caracas	MN	4,703.2	4,009.3	17.0	31,323.6	27,513.3	68,163.0	453,965.0	184	177	4.0	3
Leo Burnett-Venezuela	Caracas	MJ	2,601.1	1,810.3	44.0	17,341.1	12,067.8	37,697.0	251,320.0	91	75	21.0	1
ABC-McCann Publicidad	Caracas	MJ	2,495.8	2,046.3	22.0	16,647.0	13,649.0	37,171.0	241,261.0	86	96	-10.0	N/A
JMC Creatividad Orientada	Caracas	NA	2,188.7	1,211.0	81.0	14,591.2	8,073.0	31,720.0	211,466.0	60	45	33.0	2
FCB/Siboney/Blanco Uribe	Caracas	MN	1,596.0	1,503.2	6.0	10,645.6	10,026.5	23,131.0	154,284.0	70	89	-21.0	1
Ghersy/Quintero & Ted Bates	Caracas	MN	1,290.3	1,035.0	25.0	8,556.0	6,900.0	18,700.0	124,000.0	56	55	2.0	1
AW/Compton	Caracas	MJ	1,095.1	992.2	10.0	6,574.7	5,953.0	15,871.0	95,286.0	48	45	7.0	1
Grey Advertising de Venezuela	Caracas	MJ	603.0	701.9	-14.0	4,022.1	4,681.4	8,739.2	58,290.9	41	40	3.0	1
Young & Rubicam	Caracas	MN	356.7	445.1	-20.0	2,379.8	2,968.6	5,170.0	34,490.0	28	36	-22.0	N/A
YUGOSLAVIA													**Exchange rate: 0.0025482 dinar**
SM Delo	Belgrade	NA	1,146.7	2,497.2	-54.0	5,096.4	12,741.0	Din450,000.0	Din980,000.0	50	22	127.0	2
ZAMBIA													**Exchange rate: 0.1621 kwacha**
Young & Rubicam (Zambia)	Lusaka	MJ	274.0	120.0	128.0	1,828.0	801.0	Zk1,691.0	Zk11,276.9	18	17	6.0	N/A
ZIMBABWE													**Exchange rate: 0.5919 Z dollar**
Barker McCormac	Harare	NE	1,401.6	833.0	68.0	6,372.4	3,669.8	Z$2,367.9	Z$10,766.0	75	61	23.0	2
Michael Hogg/Young & Rubicam	Harare	MN	1,150.0	922.0	25.0	7,671.0	6,147.0	1,944.0	12,960.2	70	75	-7.0	N/A
SSC&B: Lintas Worldwide	Harare	MJ	554.0	420.5	32.0	3,098.1	1,910.6	936.0	5,234.2	38	36	6.0	1

Notes

(Continued from Page 77)

SWEDEN

Ted Bates includes Ted Bates City, Stockholm, and September, Helsingborg **Kread Gruppen** financial year July 1 to June 30 **Grey Svenska** includes ARC International, Claesson & Co., Observera, Network Production, Grey Com, Grey Medical, Grey Direct **Young & Rubicam** includes Cato Johnson, Wunderman and Burson-Marsteller **McCann Erickson** includes Werne Stockholm and Werne Malmo, which were merged into the M-E office last year **Ehrenstrahle International** figures are combination of Stockholm and London offices. Ehrenstrahle 55% owned by BBDO **HLR/BBDO** 75% owned by BBDO **Blanking** Associated with Saatchi & Saatchi Compton **DFS Pihlstroem** 49% owned by DFS Dorland **RSCG Hawi** 51% owned by RSCG, Paris **Thor & Co.** '86 billings AA estimate **NPP Reklambyra** gross income for both years AA estimates

SWITZERLAND

Adolf Wirz headquartered in Basel, with offices in Vienna, Milan and Frankfurt **Advico AG** Affiliated with Ted Bates **Young & Rubicam** includes Burson Marsteller **Gisler & Gisler/BBDO** 80% owned by BBDO **Kloeti Advertising** Affiliated with Saatchi & Saatchi Compton **BEP** Majority owned by Publicis International **Cash RSCG** 51% owned by RSC&G, Paris **T.C. Mettler** Affiliated with DFS Dorland **DMB&B** Office closed in December, '86

TAIWAN

Gaynor Associates Affiliated with J. Walter Thompson Co. **United Communications** Affiliated with McCann-Erickson **Eastern Advertising** Affiliated with Tokyu Advertising International **Target Advertising** Associated with Saatchi & Saatchi Compton **Stentor/BBDO** 20% owned by BBDO Worldwide

THAILAND

Spa Advertising Associated with Saatchi & Saatchi Compton Worldwide **Prakit & FCB** 30% owned by FCB Communications **Synergie Communications** Affiliated with Bozell, Jacobs, Kenyon & Eckhardt. 1986 figures are for nine months **Paterson & Partners** majority owned by DMB&B **Ball Partnership** Figures did not arrive in time to be included in the charts. 1986 gross income $656.9 on billings of $4,394.0

TRINIDAD

Hernandez/FCB 49% owned by FCB Communications **Bozell, Jacobs, Kenyon & Eckhardt Caribbean** 26% owned by BJKE

TURKEY

Manajans/Thompson 25% owned by J. Walter Thompson Co. **Cenajans** Associated with Grey Advertising-**Pars/McCann-Erickson** 51% owned by McCann-Erickson **Guzel Sanatlar Reklamcilik** Associated with Saatchi & Saatchi Compton **Moran Ogilvy & Mather** 40% owned by Ogilvy & Mather **Grafika-Maya** 49% owned by SSC&B:Lintas **Yaratim/FCB** 30% owned by FCB Communications **Radar Reklam, Ekol Advertising** and **Aya Ad Services** gross income for both years AA estimates

URUGUAY

Corporacion Publicitaria Affiliated with J. Walter Thompson Co. **Impetu Organizacion Publicitaria** Affiliated with BBDO

VENEZUELA

The 1986 exchange rate for the Venezuelan bolivar has been changed to 0.069 from 0.0559 since, according to Venezuelan government regulations, all dividends relating to '86 earnings remitted by a Venezuelan subsidiary to a foreign parent will be converted at this rate. **Corpa** 19.9% owned by Ogilvy & Mather **ABC-McCann Publicidad** M-E acquired 100% ownership in 1985 **FCB/Siboney/Blanco Uribe** 46% owned by FCB Communications **Young & Rubicam** 19.9% owned by Y&R

ZIMBABWE

Barker McCormac Associated with Saatchi & Saatchi Compton **Michael Hogg/Young & Rubicam** 25% owned by Y&R#

Nissan's tough road

(Continued from Page 4)
agency review for Nissan (*see story below*). The consulting company is known as much for squeezing agencies' compensation arrangements as it is for thoroughness in ad agency reviews.

Canter, Achenbaum (then known as Canter, Achenbaum, Heekin) handled the Nissan search 10 years ago, when Esty was selected to replace Parker.

Esty has handled the account on a fee basis, rather than a straight commission based on billings, and the new agency will undoubtedly be asked to negotiate similar terms.

Following Toyota Motor Sales' lead, Nissan will insist the account be handled on the West Coast.

Although Toyota's agency, DFS Dorland Worldwide, at first resisted the move, it completed the relocation of the creative work from New York to its Torrance, Calif., office earlier this year.

Ogilvy & Mather, with its full-service Los Angeles office, remains a front-runner in the race for the account, according to industry executives. But several West Coast agency sources are putting money behind dark horses, including Fallon McElligott, Minneapolis.

"Nissan is looking for a creative solution, and Fallon is a hot shop right now," said one source.

Nissan's Mr. King said he is entering the review with an open mind. "We're going in with wide parameters," he said. "We have no predetermined ideas about the size of our next agency."

Commenting on the possibility of splitting the account, Mr. King said he would prefer to have one agency service the entire account, "but I'm open-minded . . . and will consider any new wrinkles."

If the truck account were to be broken out, that could make Chiat/Day a candidate for that business. Agency sources say the agency won't jeopardize its Porsche North America account by pitching the entire Nissan business.

As for Nissan's declining market share, Mr. King attributed sales slippage to the rapid introduction of new vehicles last year.

Nissan brought out six all-new vehicles—out of its lineup of nine lines—in 1986, leaving it with the challenge of moving from one introduction to the next, without a chance for any sustaining campaigns.

He added that the U.S. car market absorbed 300,000 vehicles last year from new players in the market, such as Hyundai Motor America and Yugo America.

Several other automobile ad accounts broke loose recently in the white-hot competitive environment. The battle for a share of sluggish overall sales is putting additional pressure on agencies to produce breakthrough advertising.

Nissan's firing of Esty could affect the $120 million American Motors Corp. account now handled by another Saatchi & Saatchi Co. agency, Saatchi & Saatchi Compton Worldwide, New York.

The AMC account is up in the air because of the bid by Chrysler Corp. to acquire the ailing automaker. While Compton would like to retain the business, it probably would relinquish it if Saatchi & Saatchi goes through with a plan to merge Compton with sister agency DFS Dorland Worldwide, which handles Toyota.

Austin Rover Cars of North America, Miami, last week took one hot creative shop out of the running for Nissan: It selected Hal Riney & Partners, San Francisco, for its $20 million account.

That change comes shortly after the February launch of its $20,000 Sterling sports luxury sedan, which indicates that auto marketers don't feel they can wait long to solve sales problems. Beber Silverstein & Partners, Miami, previously handled.

Riney will handle all creative, and print media buying, while broadcast placement will stay with RMR Advertising, New York.

Lotus Performance Cars' $2 million account recently changed hands, too, going from Durfee & Solow to McCann-Erickson, both New York.

Lotus was acquired last year by General Motors Corp.#

Raymond Serafin in Detroit contributed to this story.

Canter, Achenbaum surfaces when big advertisers jettison

By JENNIFER PENDLETON and CLEVELAND HORTON

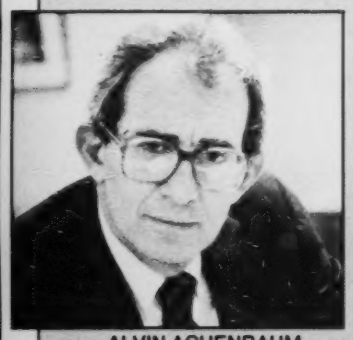
Ten years ago, when Nissan Motor Corp. fired Parker Advertising, it hired New York marketing consultant Canter, Achenbaum, Heekin—now Canter, Achenbaum, Associates—to take charge of its agency search.

Last week, when Nissan fired the agency that emerged from that review process, William Esty Co., Canter, Achenbaum was again on the scene.

The 14-year-old company offers a range of marketing-related services, but it is best known for helping match advertisers with agencies. Recently, it handled two new Asian entrants to the U.S. automotive marketplace—American Honda Motor Co.'s Acura division and Hyundai Motor America, the Korean automaker.

It also helped match Toyota Motor Sales with DFS Dorland Worldwide (then Dancer Fitzgerald Sample).

Chairman Alvin Achenbaum, a veteran of J. Walter Thompson Co. and Grey Advertising, emphasizes that Canter, Achenbaum does more than just handle agency reviews.


ALVIN ACHENBAUM

"If that's all we did, we'd starve," he says. But, he concedes, "probably 85% of our notoriety comes from this area" of business.

With partners Stanley Canter, a veteran of Ogilvy & Mather and McCann-Erickson, and Richard S. Lessler, a former vice chairman of Interpublic Group of Cos., Mr. Achenbaum has developed a reputation for negotiating tough compensation deals for clients.

This skill hasn't made Canter, Achenbaum popular among ad agencies, but Mr. Achenbaum says the company is misunderstood. "We're not tough, we're fair," he says. "And reasonable."

Gerrold Rubin, president of Rubin Postaer & Associates, Los Angeles, agency for Honda's general-market advertising, uses a baseball analogy to describe his feelings: "It's like the pitcher who throws a high, hard one at your head. He may be a good pitcher, but you don't invite him to dinner."

Canter, Achenbaum provides a systematic approach to agency selection tailored to the specific needs of individual clients, says Mr. Achenbaum. "We talk to our clients in great detail."

Critics contend Canter, Achenbaum's system is inflexible and tends to favor larger, established agencies.

Advertisers and agencies alike agree that Canter, Achenbaum is "thorough." Jim Agnew, exec VP, J. Walter Thompson USA/West, says of the Nissan review: "I expect it will be extremely deliberate, long and they'll be very involved, right through the compensation [negotiations]."

Says Cy Schneider, chairman/Pacific, Bozell, Jacobs, Kenyon & Eckhardt: "Canter, Achenbaum knows advertising backward and forward. Anyone intending to compete should be ready to meet stringent requirements."

Mr. Achenbaum says Canter, Achenbaum executives know the right questions to ask agencies. "We have the skill to be able to expose agencies, warts and all . . . to get beyond the facade of the initial sales pitch," he asserts.

One of the more interesting sidelights to Canter, Achenbaum is that it has been able to work for direct competitors without facing conflict-of-interest charges.

While it hasn't worked for Toyota and Nissan at the same time, the company has been privy to sensitive marketing information from both marketers. But Mr. Achenbaum insists any information learned while working for a client remains top secret. Only a few senior people on Canter, Achenbaum's 20-person staff are allowed access to proprietary information.

The consultant's integrity was questioned in 1977, when it was involved in Nissan's last agency hunt. Grey Advertising, which was one of six agencies pitching, resigned, claiming Canter, Achenbaum was biased toward Wells, Rich, Greene (AA, April 11, 1977).

Esty, however, went on to win the account.#

For the Record

FOOTE, CONE & BELDING COMMUNICATIONS, Chicago, reported "higher than expected" earnings for the first quarter, but results were lower than in 1986. FCB posted net income of $2 million, down 2.2% from first quarter 1986, on revenues of nearly $71.1 million, off 6.4% from a record high in '86. A 3.1% increase in foreign revenue partially offset a 9.5% decline in U.S. operations. Separately, **Omnicom Group**, New York, reported a 17% decline in net income to $6.3 million in the first quarter and a 5% increase in commission and fee income to $177.2 million.

SCALI, McCABE, SLOVES, New York, which agreed to buy back 20% of its shares from parent Ogilvy Group and a rights option to acquire another 10% nine months ago (AA, Aug. 25, 1986), cannot turn around and go public with those shares and also has no plans to be spun off as a separate public company from Ogilvy, despite published reports. "Those shares that we sold to the Scali management group and profit-sharing fund have long-term restrictions well into the 1990s," said Ogilvy Treasurer John Gill. He noted the shares were sold at book value and Ogilvy shareholders would object if Scali management in turn profited in the stock market from that. Both Mr. Gill and Scali CEO Marvin Sloves said there were no discussions at present about a spinoff.

RUBIN REID NOTO & EHRENTHAL, New York, opened with $24 million in billings as the successor agency to Shaller Rubin. Chairman Mel Rubin, Exec VP-Creative Director Michael Reid and Senior VP-Associate Creative Director Peter Noto all were principals in Shaller Rubin, while Herb Ehrenthal, exec VP-chief operating officer, was a senior VP-senior management representative at Needham Harper Worldwide. Milt Shaller, another principal, has left the agency "to pursue other interests." The new agency is at 122 E. 25th St., 10010.

NEWSPAPER AD VOLUME in 1986 jumped 7.2% to about $27 billion and accounted for more than 26% of total U.S. ad spending, said the American Newspaper Publishers Association, Washington. Daily circulation last year for morning and afternoon papers fell about 0.4% to 62.5 million, while Sunday circulation increased about 5% to 61.5 million.

RETAIL SALES for the four weeks ended May 2 registered double-digit gains for some leaders. K mart Corp., Troy, Mich., posted an 11.9% increase to $1.95 billion; May Department Stores Co., St. Louis, was up 15.5% to $758.8 million; and Montgomery Ward & Co., Chicago, was up 14.2% to $326.16 million. J.C. Penney Co., New York, was up 7.6% to $972 million.

ESPN, Bristol, Conn., last week signed its first agreement with a cable TV system to carry its package of National Football League games this fall. Cable TV Co., Berwick, Pa., serves a total of 50,000 subscribers.

ALFIN FRAGRANCES, New York, was advised by the New York State Attorney General's office that it is investigating Alfin's Glycel skincare anti-aging claims. The letter follows the Food & Drug Administration's actions against Alfin, Estee Lauder Inc. and Avon Products (AA, April 27). The FDA also has since informed Cosmair, Shiseido Cosmetics and Christian Dior Perfumes that they, too, must seek new-drug status for their products if they wish to keep making certain claims.

GENERAL MOTORS CORP.'S GMC Truck division, Pontiac, Mich., will launch its new full-size Sierra pickup with a pool of one 60-second and two 30-second TV spots June 1 and with ads in a broad cross section of June magazines. McCann-Erickson, Troy, handles.

PROCTER & GAMBLE CO., Cincinnati, last week filed a petition with the Food & Drug Administration to use olestra (formerly called sucrose polyester) as a calorie-free, cholesterol-free fat replacement in shortenings, oils and salted snacks. Sources said approval of the food additive could come within a year. P&G has been testing olestra for more than 20 years.

HILL & KNOWLTON, New York, and the Wirthlin Group, McLean, Va., a national research and polling company, announced a joint marketing agreement in which they will provide public relations and research services to clients. The two companies, while remaining separate, will promote the services of the other to clients.

FIRESTONE TIRE & RUBBER CO. this year will start moving its corporate headquarters to Chicago from Akron, Ohio, to put its retail business in "a more retail and finance-oriented community," a spokesman said. Firestone hasn't decided whether its $20 million ad account will be handled by the Chicago office of Bozell, Jacobs, Kenyon & Eckhardt. The agency now handles the business out of its Birmingham, Mich., office.

DOW CHEMICAL CO.'S Merrell Dow Pharmaceuticals, Cincinnati, is offering $840 million in cash for seven brands owned by the A.H. Robins Co., Richmond, Va. The brands include Chap Stick, Dimetapp and Robitussin. A Robins spokesman said the company, now under Chapter 11 bankruptcy protection due to litigation over the Dalkon Shield, has "no interest in selling major portions" of its business.

ACCOUNT ACTIVITY: **Panasonic Industrial Co. Communications**, Secaucus, N.J., to **Lewis, Gilman & Kynett**, Philadelphia, for its $10 million account. Cunningham & Walsh, New York, resigned when it was acquired by N W Ayer, agency for the Toshiba Business Products Group. . . . **MainStreet**, Bannockburn, Ill., a division of Federated Department Stores, to **Bayer Bess Vanderwarker & Flynn**, Chicago, from W.B. Doner & Co., Detroit, for its $3 million broadcast account. . . . **Hardee's Area VII** co-op, Livonia, Mich., to **Baker, Abbs, Cunningham & Klepinger**, Birmingham, from Handley Miller, Indianapolis, for its $2 million Midwest regional account. . . . **National Pork Producers Council**, Des Moines, Iowa, to **Campbell-Mithun**, Chicago, from in-house for its estimated $1 million food-service account.

WORTH NOTING: **Leo Burnett Co.**, Chicago, entered Turkey through a partnership with Markom Reklam Hizmetleri, Istanbul, now known as Markom/Leo Burnett. . . . **Kraft Inc.**, Glenview, Ill., last week began a $3.5 million spot TV campaign for its Lender's Bagel Bakery unit. Geers Gross Advertising, New York, handles. . . . **Benihana National Corp.**, Miami, hit with declining sales and a pinch in retail freezer space, is exploring options to sell or license its frozen-food division, which markets Benihana Oriental Dinners. . . . **Hearst Corp.**, New York, bought the *Houston Chronicle* for $415 million, $15 million above its original offer.

NOTE

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